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November 1987

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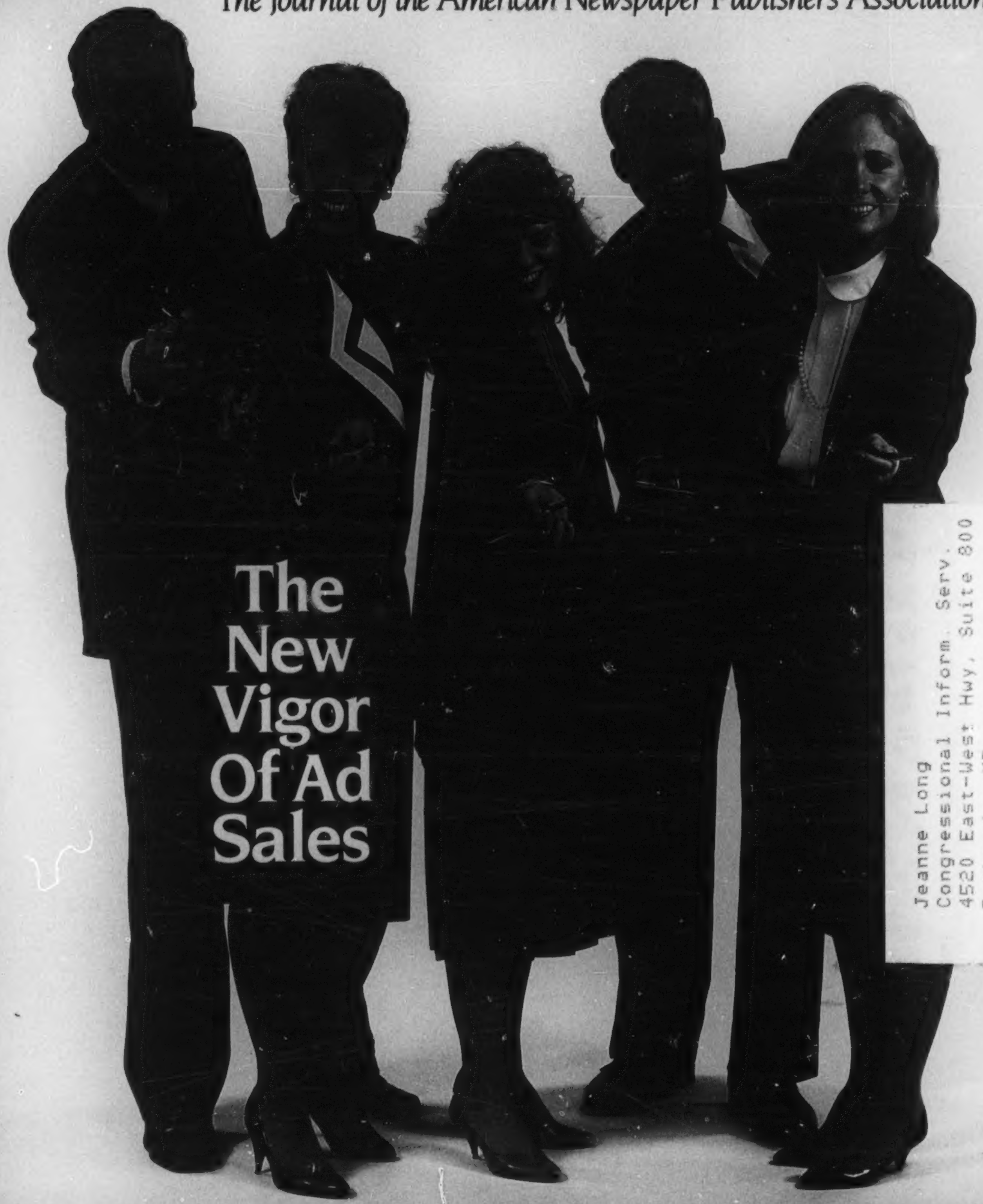
presstime

The Journal of the American Newspaper Publishers Association

Monopoly Newspapers Face Competition Aplenty



The New Vigor Of Ad Sales

Jeanne Long
Congressional Inform. Serv.
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Bethesda, MD
20014

presstime

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Special Report *The local advertising game has changed, and newspapers are fielding a new team of salespeople to play it. They are better educated, the majority are women, and they are being trained to be "marketing consultants" to their retail accounts. As the competition for retail advertising has heated up, newspapers also have begun to change the way they pay their salespeople. Taking a cue from broadcast media, whose sales reps have a reputation for being more aggressive and having market savvy, newspapers are providing greater financial incentives to sell.* 24

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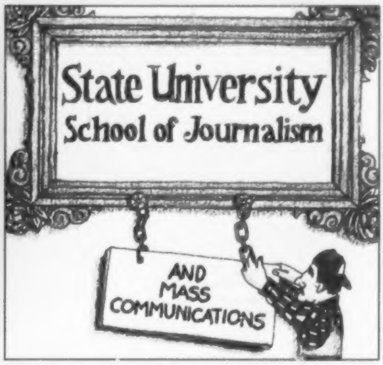

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CHAIRMAN'S CORNER

Don't try to quantify editorial excellence

Keeping score is one of the things we all, as business managers, try to do. We quantify what we do. And we measure results against various standards—industry standards, operating plans, historical performance, competitors' activities, among others. It is rational. We control by the numbers.

But we are in a wonderful business that requires us, on important matters, deliberately to substitute experienced judgment for rational measurement.

I talked about this at a meeting of the International Newspaper Financial Executives, pointing out that we quantify just about everything: ad volume against budget, last week and a year ago; circulation starts and stops and penetration levels; ad content versus news content in each edition; mechanical cost per page; and operating costs and income against time periods, budgets, norms, trend lines, market expectations and other companies' performances.

But how do you score staff pride and fulfillment, well-written leads, skillful interviewing and good stories that engage readers and move them either to action or fresh understanding?

George W. Wilson

We cannot very well assign numbers to the editorial genius, judgment and gut instinct, sharpened by experience, that lead a reporter, editor or publisher to pursue a story no one else is doing. Newspaper news work is at heart a creative process involving people who take chances trying to capture at one moment in time that most elusive and precious

If journalists' work is not to be merely clerical and mechanistic, we must allow writers and editors great latitude and understanding for a function that requires imagination, persistence and careful nurturing.

Newspaper reporting, editing and commentary make up the institutional, social and constitutional bedrock of what we are all about. And the process doesn't lend itself to cost/benefit analysis.

I am reminded of what E.B. White wrote about those who try to analyze humor:

"Humor can be dissected, as a frog can, but the thing dies in the process and the innards are discouraging to any but the pure scientific mind. . . . Humor won't stand much poking. . . . It has a certain fragility, and evasiveness, which one had best respect. . . ."

As we newspaper people construct our necessary business numbers, measure progress and keep score, let's not forget that editorial excellence evades useful quantification.

And it won't stand much poking.

George Wilson

George W. Wilson
ANPA Chairman

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Stocks stable as consumption rises

Newsprint consumption continues to climb.

In September, all U.S. users consumed 4.8-percent more newsprint than during the same month in 1986. Their increase for the first nine months of this year was 2.9 percent.

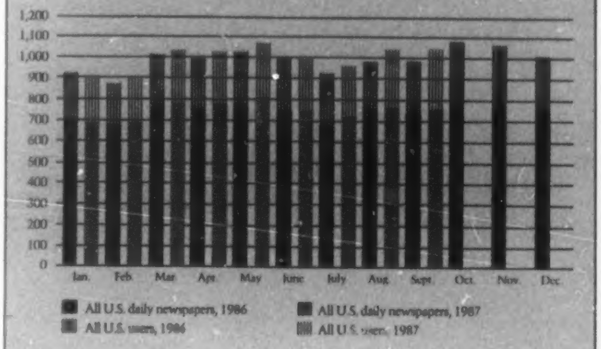
Consumption by U.S. dailies was 4.2-percent higher in September and 4.9-percent higher for the nine-month period.

At the end of September, stocks of newspapers in ANPA's statistical sample were exactly the same as a year earlier—42 days' supply. North American mill stocks, however, were down 9.5 percent, from 346,223 tons to 313,271 tons.

September mill operating rates were 96 percent in Canada and 95.1 percent in the United States. For the first three quarters of 1987, the U.S. and Canadian operating rates were 94.4 percent and 97 percent, respectively.

Canadian production in September was 7.1 percent above last September's and U.S. production increased 6.8 percent. For the first three-quarters of the year, North American production increased by 4.3 percent.

Estimated newsprint consumption, 1986-1987 (thousands of metric tons)



Estimated consumption of all U.S. daily newspapers[1]

Region	**August 1987(r)**	**August 1986**	**% Change**
Northeast	196,589	181,376	+8.4
North Central	164,020	157,318	+4.3
South	237,176	232,939	+1.8
West	173,634	162,614	+6.8
Circulation Size			
up to 25,000	60,290	56,673	+6.4
25,001-100,000	162,384	152,036	+6.8
Over 100,000	548,745	525,538	+4.4
August totals	771,419	734,247	+5.1
Eight-month totals	6,044,760	5,756,843	+5.0
Region	**September 1987(p)**	**September 1986**	**% Change**
Northeast	195,403	191,337	+2.1
North Central	164,339	157,788	+4.2
South	233,201	222,909	+4.6
West	172,654	162,567	+6.2
Circulation Size			
up to 25,000	59,179	55,524	+6.6
25,001-100,000	160,283	146,340	+9.5
Over 100,000	546,135	532,737	+2.5
September totals	765,597	734,601	+4.2
Nine-month totals	6,810,357	6,491,444	+4.9

Estimated consumption of all U.S. users

	1987	**1986**	**% Change**
July totals	967,075(r)	931,431	+3.8(r)
August totals	1,045,178(r)	997,342	+4.8(r)
September totals	1,047,014(p)	998,655	+4.8(p)
Nine-month totals	9,010,490(p)	8,760,446	+2.9(p)

Production

	Canada	**U.S.A.**	**North America**
September 1987	796,750	448,187	1,244,937
September 1986	743,874	419,525	1,163,399
Increase	+52,876	+28,662	+81,538
	+7.1%	+6.9%	+7.0%
Nine months 1987	7,250,839	3,948,348	11,199,187
Nine months 1986	6,915,802	3,825,284	10,741,086
Increase	+335,037	+123,064	+458,101
	+4.8%	+3.2%	+4.3%

Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
September 1987	631,262	102,630	118,177	852,069
September 1986	591,250	95,512	153,600	840,362
Nine months 1987	5,273,382	857,719	1,126,147	7,257,248
Nine months 1986	5,017,857	812,607	1,098,142	6,928,606
Increase	+255,525	+45,112	+28,005	+328,642
	+5.1%	+5.6%	+2.6%	+4.7%
From U.S. mills				
September 1987	434,618		16,684	451,302
September 1986	408,107		29,195	437,302
Nine months 1987	3,735,346		219,600	3,954,946
Nine months 1986	3,567,838		245,311	3,813,149
Increase or decrease	+167,508		-25,711	+141,797
	+4.7%		-10.5%	+3.7%
From North American mills				
September 1987	1,065,880	102,630	134,861	1,303,371
September 1986	999,357	95,512	182,795	1,277,664
Nine months 1987	9,008,728	857,719	1,345,747	11,212,194
Nine months 1986	8,585,695	812,607	1,343,453	10,741,755
Increase	+423,033	+45,112	+2,294	+470,439
	+4.9%	+5.6%	+0.2%	+4.4%

Stocks

U.S. publishers[3]	**Tonnage**	**Days' supply On hand**	**Days' supply In transit**
July 1987	931,330	39(r)	6(r)
July 1986	892,127	39	6
August 1987	904,565	37(r)	6
August 1986	892,786	38	6
September 1987	917,741	36p	6(p)
September 1986	904,331	36	6
Canadian mills			
September 1987	270,795	—	—
September 1986	277,593	—	—
U.S. mills			
September 1987	42,476	—	—
September 1986	68,630	—	—

---

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.

(r) = revised (p) = preliminary

Newspaper stocks, like others, are 'battered' in volatile October market

Newspaper companies rode the same stock market roller coaster as the other publicly traded firms Oct. 12-23—the two most volatile weeks of trading on record. And in the last week of October, the market was still unstable.

"They've all been battered the way anyone else has been battered," said John Morton, a newspaper analyst with Lynch, Jones & Ryan in Washington, D.C.

By the end of the two-week period, the newspaper companies as a group had regained some of the ground lost during the market's free fall. And executives at two of the firms said they are confident the gyrations will not affect profitability in the short term.

"We'll have a very good fourth quarter," said Douglas H. McCorkindale, vice chairman and chief financial officer of Gannett Co. "There are no indications of a dramatic reaction" to the 25-percent decline in its stock value during the two weeks. (See table.) In the long term, he said, "It takes time to settle down . . . and see how advertisers react, and they will react only after the consumers react."

Alvah H. Chapman Jr., chairman and chief executive officer of Knight-Ridder Inc., whose stock declined 22 percent during the period, said, "The volatility of the stock *per se* wouldn't affect profitability unless it affects the economy of the country, which would affect advertisers."

Both executives said there should be no impact on the companies' pension funds.

As a group, the 15 publicly traded newspaper companies tracked by Morton Research dropped a net 23 percent over the two weeks—1 percent more than the 22-percent net drop of the widely watched Dow Jones average of 30 industrial stocks.

From a closing high of 844.24 on Tuesday, Oct. 13, the Morton index dropped to 771.42 by the end of the first week and then plummeted to 564.16 on the "black Monday" of Oct. 19—a decline of 33 percent in just four trading days.

After slipping further to 537.29 a day later, the newspaper stocks rebounded, closing out the second week at 651.74, for the 23-percent net loss for the period.

The Dow Jones Industrial Average fell from an Oct. 13 high of 2508.16 to 2246.74 on Oct. 16, then plummeted to a two-week low of 1,738.74 on black Monday—a decline from peak to valley of 31 percent. The DJIA ended the second week at 1,950.77, for the 22-pecent decrease for the period. (See chart.)

Curtis L. Alexander, a securities analyst with Mabon, Nugent & Co. in New York City, noted that from the time most newspaper stocks reached their highest-ever price in August until Oct. 23, their decline as a group was 32.8 percent.

Their performance, particularly during the hectic week of Oct. 19-23 that broke all stock exchange records in numbers of shares traded, "is exactly in line with the market and what you would expect," said Alexander.

"They (the newspaper companies) took a bath," said John S. Reidy, a media analyst for Drexel Burnham Lambert in New York City.

The market "is highly volatile," Reidy said, "and nobody really is thinking much about the fundamentals of the (newspaper) business, such as the presumed ability of these companies to produce consistent, or at least a very predictable, long-term growth in cash flow and operating earnings."

Overall, newspaper stocks did not fare noticeably better or worse than stocks for other media industries, he added.

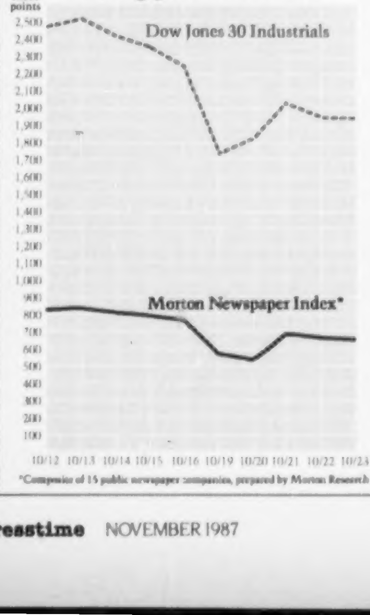
Among newspaper companies, Affiliated Publications was the only one to announce a plan to buy back its stock as a means of propping up its price per share. It said it would buy back up to 1 million shares.

At least two newspaper companies suspended trading for a while.

After The Washington Post Co. stock dropped 14 points Oct. 16 to $221 a share, it did not reopen for trading until about noon Oct. 21. It was one of five low-volume stocks suspended from trading by officials of the American Stock Exchange because of the extreme "imbalance of orders"—the gap between the selling price and offers to buy.

On the New York Stock Exchange, Gannett stock was suspended from trading for about half an hour Oct. 21 because of an imbalance of orders, McCorkindale said. ☐

Stock market closing price indexes



*Composite of 15 public newspaper companies, prepared by Morton Research

Alberto Pacheco

Roller coaster ride of 15 public newspaper companies' stock prices

	Oct. 12	Oct. 19	Oct. 23	% Change
Affiliated Publications Inc.	65⅝	50¼	50	-24
A.H. Belo Corp.	66	57¾	53	-20
Capital Cities/ABC Inc.	413½	356	336½	-19
Dow Jones & Co.	40¾	28⅞	33	-19
Gannett Co.	47¾	32¾	36	-25
Knight-Ridder Inc.	51¼	43⅜	39⅞	-22
Lee Enterprises Inc.	28⅝	25½	22½	-21
Media General Inc.	39⅞	35⅜	31⅜	-21
Multimedia Inc.	67¾	60	46¾	-31
The New York Times Co.	39⅜	29½	31½	-20
Park Communications Inc.	36½	33	29	-21
Pulitzer Publishing Co.	43¾	37¾	34¾	-21
The Times Mirror Co.	97½	68	74⅛	-24
Tribune Co.	45½	30¼	36⅝	-19
The Washington Post Co.	242	221	189	-22

Source: Morton Research

Outlook

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GIVING PAID NEWSPAPERS A RUN FOR THEIR MONEY

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Special Report *There has been a small but steady shift for weekly newspapers toward free circulation. Some of the earliest date back to the 1930s. Today, their numbers are estimated to be in excess of 2,000 in North America. Even paid-circulation papers have their own version of the freebie in their total- or target-market publications. And lately, free papers have become hot investment properties. But there are problem areas, and some newspaper people denigrate this segment of the business. Even so, many experts label the free-paper field a fertile growth area.* **22**

Outlook '88 *Despite economic uncertainty, publishers and newspaper analysts see a more profitable year ahead for U.S. daily newspapers.* **6**

Regional marketing *The trend among national advertisers to target their ads geographically has the potential for generating more ads for newspapers.* **10**

Campaign coverage aplenty *Newspapers are readying bigger-than-ever election efforts amid questions about the kind and quantity of coverage warranted.* **14**

British press revisited *The newspaper revolution in the United Kingdom is continuing as publishers flee Fleet Street for new quarters.* **18**

Ousting unions *Elections to decertify unions are now occurring at newspapers at the rate of about one a month. Most of them have bad outcomes for unions.* **30**

Sending out for separations *Using commercial color-separation houses is commonplace among smaller newspapers that can't afford scanners.* **35**

Profile: Karen Howze *Wanting to help people led the managing editor of USA Today's international edition first to the convent, then to journalism.* **36**

Essay: Accrediting lesson *Journalism educator George P. Kennedy says Allied Daily Newspapers' venture into evaluating J-schools fills accreditation gaps.* **38**

Shuffling the media mix *K mart reduces its preprint program, cancels a four-state Advo contract and plans more broadcast spending.* **50**

Electronic darkrooms *Three newspapers experiment with the wire services' digital photo systems. Testing will expand early this year.* **56**

ANPA nominees *Association's Board approves slate of ANPA officers, directors. The New York Times' Arthur Ochs Sulzberger will be nominated chairman.* **66**

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CHAIRMAN'S CORNER

Postal Rate Commission, meet an average newspaper

Everyone interested in postal rates has been expressing views to the Postal Rate Commission in recent months. Some parties have been saying a lot of misleading things about newspapers.

So, a few weeks ago I submitted testimony telling the commissioners how newspapers really work, using as an example the operations of my Concord (N.H.) Monitor, which at 22,000 circulation is just about the exact size of the average ANPA-member newspaper. (See story, p. 44.)

I told the commissioners we newspaper people appreciate their delicate task as they seek to balance all the rate-setting criteria in the law and all the mailer interests in the marketplace. Commissioners need to be aware that direct mailers want to use the rate hearings to tilt the marketplace in their own favor. They also must take into account the benefits to our democracy when newspaper advertising contributes to the flow of news to the public.

The commissioners understand what the Postal Service calls "institutional" costs. Basically, that's overhead the service doesn't attribute to any single class of mail. Newspapers, as users of the mail and competitors of others who use the mail, depend on the commissioners' insistence that *all* classes of mail pay their own attributed costs and make a full contribution to the overhead.

George W. Wilson

I have asked the commissioners to understand that newspapers have "institutional" costs, too. From every advertising message a newspaper must derive a contribution to its editorial expenses. I provided them some examples of the Monitor's costs of covering the New Hampshire Primary, preparations for the Challenger flight and the Seabrook reactor story.

The Postal Service supports a system of universal delivery service and thereby knits this nation together; that is its institutional role in our society. Newspapers, the great mass medium of news information, help this nation form consensus opinions on matters of public policy by reporting the news in depth; that is our institutional role in America.

I reminded the commissioners that they added an extra foot or two to our hurdle for successfully doing business when, starting in about 1979, they purposefully lowered third-class rates to let the Postal Service draw advertising out of newspapers and into the direct-mail business. My statement explained the consequences of that for the Monitor and for all newspapers.

I told the commissioners I wasn't asking for special protection for newspaper advertising, but I wanted them to understand our own institutional costs, just as they understand their own, before they compare us too closely to direct mailers. I urged them to see our business properly and whole and to set fair rates under which every class of mail pays its share.

George Wilson

George W. Wilson
ANPA Chairman

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BRITISH NEWSPAPERS

As streamlined operations relocate to the bank of the Thames,

BY BRIAN P. KNOX-PEEBLES

(Editor's note: In the December 1986 issue of **presstime**, *Knox-Peebles chronicled the first phase of the revolution going on in British newspapering: the transformation of an industry from one dominated by outdated technologies and labor practices to one that is market-led, state-of-the-art produced and responsibly managed. This article updates the original and charts the continuing tumult in the British press.)*

Massive changes taking place in the British newspaper industry are advancing along lines broadly laid out a year ago.

Three sets of events concluded the initial 16-month-long phase last February.

One was the sensational backing down on Feb. 5 by the largest print union, SOGAT (Society of Graphical and Allied Trades) in the face of legal action. SOGAT, threatened with final sequestration of its assets, agreed to abandon a brutal and violent strike that had lasted for 13 months. The union tried to force Rupert Murdoch of News International either out of business or to restore 5,500 jobs and positions of influence union members held prior to his move from Fleet Street to Wapping.

Knox-Peebles is group marketing director of one of the principal operating divisions of London-based United Newspapers, a major newspaper and magazine publishing company with interests also in the United States.

The second big event came just days later when the National Graphical Association, the other major union involved at Wapping, similarly backed down.

The third was the announcement by Express Newspapers of plans to sell its Fleet Street building and move to a new administration and editorial center near Blackfriars Bridge. It was the last of the Fleet Street companies to make clear its intentions to relocate.

Express Newspapers' London printing operation will move to the Docklands area, where the existing Daily Telegraph plant will be expanded, and the new operation on the bank of the Thames will be owned jointly by United Newspapers and the Telegraph. The balance of the production of Express papers will be carried out in northern England.

Express Newspapers, which had already laid off 2,100 employees, or 31 percent of its workforce of 6,800, in March 1986, announced it will lay off another 2,500 because of job redundancies. Total cost of redundancies in 1986 and 1987 will be well over 100 million pounds (about $183 million U.S.), but the sum should be recovered over 18 months.

The Illustrated London News

No longer is Fleet Street the hub of British newspapering.

ASSESSING PHASE I. Most of the new national newspapers, whose launches have been made possible by the huge reduction in "cost of entry," belong to what I have characterized as Phase II of the British press evolution—February 1987 to the present. However, in assessing the successes and failures among them, it is convenient to include the first two to emerge—News U.K.'s Today (March 1986) and The Independent (October 1986).

These are difficult judgments, not so much in assessing whether a paper is going to make it as in deciding whether circumstances may be artificial, transient and irrelevant.

This situation is compounded by aspirations of the protagonists who may not immediately have seen that what they so lovingly and so lavishly gave birth to was, both technologically and in concept, a 25-year-old.

Some who possessed energy levels of quite extraordinary dimensions, as well as financial acumen and resources of similar proportions, have not only survived the catharsis but returned for the next round. Others have succumbed entirely or withdrawn temporarily to lick their wounds and contemplate the next step.

Of the survivors, **Robert Maxwell**, chairman of Maxwell Communication Corp., plainly has the stamina to come through. His London Daily News was launched last February as a direct competitor to London's Evening Standard. For a number of reasons—inadequate planning, poor distribution, flawed production—the Daily News

POST-FLEET STREET

publishers look forward to going to a different kind of bank

closed in only five months, much to the consternation of everyone involved.

Its circulation had fallen to less than 100,000, far from projected sales of over 500,000 needed to challenge the Standard. Financial losses were in the neighborhood of 1 million pounds ($1.83 million U.S.) per week.

Maxwell's apparent belief, in a commercial context, in permanent revolution is appropriate at a time of continuous upheaval as one set of practices and ideas after another is rushed in, tried and, very often, rejected. Following the collapse of the Daily News, for instance, Maxwell announced he intends to start another London evening paper and to introduce in London this year a four- or five-day free daily called The Londoner for distribution to 1-2 million households.

Maxwell also plans a free daily in Manchester; a middle-market tabloid called News Day for national distribution; a Paris-based, English-language European daily; a daily newspaper simultaneously in London and Tokyo; the possible launch of the Netherlands' first Sunday paper; and the possibility of an English-language edition of Pravda.

He already publishes the European edition of the China Daily.

All this will be attempted alongside his U.S. ventures in commercial printing and in transmitting newspaper advertising by satellite. He also made an unsuccessful effort to enter the U.S. book market by attempting to buy Harcourt Brace Jovanovich.

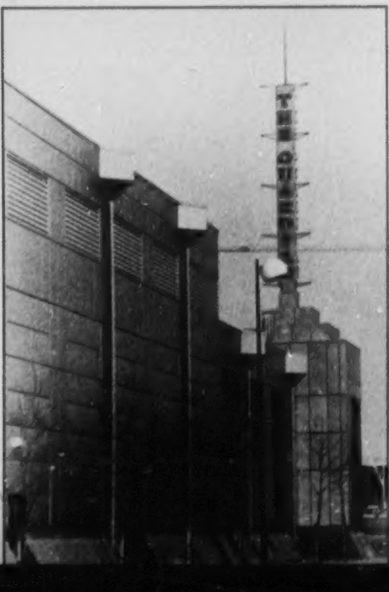
The Observer

Activity is shifting to Southwest London for The Observer (above) and to the Docklands area of East London for (proceeding clockwise) the Daily Telegraph, The Financial Times and The Guardian.

Eddie Shah is a more uncertain quantity. He was father of the revolution in 1985 with his state-of-the-art color tabloid Today, for which he aspired to a circulation of 1.5 million and profits of 20 million pounds on sales of 50 million pounds (profit of $36.6 million U.S. on sales of $91.5 million). He was unlucky, however, with both his technology and with those who installed it. He also classically underestimated the level of entrenched competition he would face and, finally, the cost of correcting mistakes.

Today collapsed bankrupt into the arms of the Lonrho Corp., owner of The Observer, five months after start-up. Its circulation stood at around 300,000 and losses at some 12 million pounds ($22 million U.S.) per month. It subsequently was sold to Rupert Murdoch who, for tactical reasons related to his plans to print his main newspapers in color, wanted access to its color plant.

Daily Telegraph



Garry Weaser, The Guardian

Here is a synopsis of the other major newspapers involved in Phase I.

- **The Independent.** The most skillful action taken by what looks to be a long-term survivor was the decision to present this new paper as though it had always been there, hence silencing the guns of those suffering from the well-known British disease of being unable to tolerate success. Effectively, what Editor Andreas Whittam-Smith and his team said was that they were embodying an aspiration of the intelligentsia for a politically uncommitted newspaper to fill the gap many felt had been created by Murdoch's acquisition of The Times of London.

The Independent began in October 1986 and was an instant editorial success. Acclaimed "Newspaper of the Year" soon after the launch, it has won a solid readership. With circulation rising steadily and topping 380,000 in November 1987, it is reckoned to be on course to break even financially early this year.

- The **News on Sunday**, started last April, followed in Today's footsteps with an unsuccessful, much criticized launch and circulation well below its break-even target. Problems beset the paper even before launch. Run by a consortium with all decisions, including editorial, in the hands of a committee, the

The Financial Times

News on Sunday was soon abandoned by its founders.

Neither editing by committee nor the paper's commitment to substantial minority representation on its editorial staff provided the market supposedly eager for a very left-of-center paper with what it wanted to read. The first edition was rightly judged a flop.

The News on Sunday subsequently was taken over by outside business interests. By September, the ailing newspaper was on its fourth editor, and circulation was about half the 300,000 copies needed to make it viable. Only substantial improvement in the product and a hard-hitting advertising campaign—leading to a doubling of circulation and significant advertising gains—could have saved the paper. Those did not come, and the paper on Nov. 20 left the market as unobtrusively as it had entered it.

- The **Evening News** was launched by Associated Newspapers as a "spoiler" on Feb. 24, 1987—the same day Maxwell introduced the London Daily News. The Evening News initially lost an estimated 50,000-60,000 pounds ($91,000 to $110,000 U.S.) a week. It appointed Fleet Street's first woman editor, Lori Miles, and by May was claiming a circulation of 50,000.

In September the newspaper underwent a relaunch in an attempt to attract more of its target audience, young working women. The circulation goal was 100,000, but even this was not reckoned sufficient to guarantee profitability.

> *The most skillful action was the decision to present The Independent as though it had always been there.*

On Oct. 30, the paper was closed. Circulation stood at 39,000.

- The **Sunday Sport** was launched regionally Sept. 14, 1986, in London and later in the Midlands, Northern England, Wales and Northern Ireland. Its circulation reached nearly half a million in eight months. Sunday Sport relies on a content mixture of sexually oriented material and articles on sports written by famous names.

The Sunday paper's initial success led to ambitions to start a daily version. This was seen as a possible major threat to another tabloid operating broadly in the same sector of the market, The Star, owned by Express Newspapers. Managements of both papers concluded that joint daily operations were preferable to a head-on clash, as Express Newspapers had plans for a Sunday Star. The competitive launches were abandoned, and a partnership was forged with an intitial transfer of editors.

That relationship failed, however. Seven weeks after entering into the partnership, Express Newspapers severed the link. Plans for a Daily Sport may now be reactivated.

- The **Daily News** of Birmingham, the United Kingdom's only free daily, has yet to make a profit. However, the 3-year-old Tuesday-to-Friday paper has made a remarkable impact on its market, and publishers are watching its progress with continued interest. It has been named "Britain's top free newspaper" among more than 950 such publications "for an outstanding contribution to newspaper design."

In an interesting development on Nov. 5, it was announced that U.S. publisher Ralph Ingersoll II acquired the established, paid competitors of the Daily News—the Birmingham Post and Mail, and allied publications. Purchase price was reportedly more than 60 million pounds ($107 million U.S.) In commenting on the purchase, The Financial Times alluded to the fierce battle between the publications, but it is unknown whether the sellout had anything to do with that situation.

National Newspapers in Great Britain[1]

	Circulation (000s)	Launched 1986	1987 Launches	Proposed 1988 Launches
Quality Dailies (and Owners):		Independent (Newspaper Publishing plc)	London Daily News, launched Feb. /closed July	Londoner, free daily (Robert Maxwell) National mid-market daily (Robert Maxwell)
Times (News International plc)	447			
Guardian (Guardian and MEN plc)	473			
Daily Telegraph (Daily Telegraph plc)	1,171			
Financial Times (Financial Times Ltd.) (Pearson plc)	222			
Popular Dailies:		Today (News U.K. Ltd.)	Evening News relaunched Feb./closed Oct. (Associated Newspapers)	
Daily Express (United Newspapers plc)	1,675			
Daily Mail (Assoc. Newspapers)	1,794			
Sun (News International plc)	4,021			
Star (United Newspapers plc)	1,240			
Daily Mirror (Mirror Group Newspapers Ltd.)	3,097			
Quality Sundays:				
Sunday Times (News International plc)	1,234			
Observer (The Observer Ltd.)	773			
Sunday Telegraph (Daily Telegraph plc)	733			
Popular Sundays:		Sunday Today (News U.K.), closed June '87 Sunday Sport (Apollo Ltd.)	News on Sunday (News on Sunday Publishing plc)	
Sunday Express (United Newspapers plc)	2,222			
Mail on Sunday (Assoc. Newspapers)	1,772			
News of the World (News International plc)	5,021			
Sunday Mirror (Mirror Group Newspapers)	2,959			
Sunday People (Mirror Group Newspapers	2,869			

[1] As of September 1987

Ingersoll is believed to be the first non-British or Commonwealth national to have bought into the U.K. newspaper industry.

PHASE II. The first of three major parts in the current phase of Britain's newspaper revolution is made up of the wave of new publications that followed the launch of Shah's Today and The Independent, and Murdoch's 1986 move from Fleet Street.

The second part of Phase II consists of the moves out of Fleet Street. It includes the sale of the old premises; the shedding of substantial elements of the workforce and the demise of power of the traditional labor unions; the re-equipping with state-of-the-art technology and new presses having enhanced color capacity; and finally, the decision by one-third of the industry to opt for contract printing largely in the provinces.

The Fleet Street departures and job eliminations actual and expected are as follows:

- January 1986: News International, 5,500 jobs
- March 1986-February 1989: Express Newspapers, 4,600 jobs in two stages.
- Early 1986: Mirror Group Newspapers, 2,100 jobs initially and possibly 2,500 later
- Summer 1987: Daily Telegraph, 1,000 jobs
- December 1987: The Observer, 500 part-time jobs
- January 1988: The Guardian, undetermined number of jobs likely to go
- Late Summer 1988: The Financial Times, 400 jobs
- Late 1988: Associated Newspapers, 700 jobs and possibly more later

All of these companies will go to "greenfield" sites on the Thames.

Once these moves are completed, two-thirds of the U.K. newspaper industry will be produced at in-house plants. They are the News International and Mirror Group titles, Associated Newspapers, the Daily Telegraph, The Guardian and The Financial Times.

The rest will be contract-printed either totally or in part. They are Express Newspapers (part), The Independent, The Observer, The Guardian (part) and Sunday Sport.

It is interesting to wonder which of those that chose to set up plants ahead of the Today initiative and Murdoch's move to Wapping would have done so had they known how that move would turn out.

There are indications that at least two might have had second thoughts about building their own plant. Part of the reason is the taste of freedom they have enjoyed for the past year while being contract-printed, in a construction interim, on presses in the provinces. Part lies in the genuine anxiety that the practices that so bedeviled management/union relations on Fleet Street may be surreptitiously transported to Docklands.

By the end of this year, all British national newspapers are expected to be profitable for the first time in memory.

Whether they are right to be anxious is open to question. When the International Typographical Union in the United States experienced the same process as is now engulfing the major unions in the United Kingdom, its membership declined about 80 percent.

If those figures are matched in Britain, it is difficult to see how the unions could assemble sufficient influence to be a real force again. There are moves to create a single print union and also to sever links with the Labor Party, but a continuing decline in membership seems to be the most realistic prospect.

Certainly the trade-union movement in general in Britain is going through a period of massive adjustment as it contemplates the scale of Prime Minister Margaret Thatcher's third-term election victory and the enormous influence that her "stock- and property-owning democracy" is having on the Labor Party, traditional champion of the unions.

The third section of Phase II is an elaborate form of shadow-boxing, as the principal protagonists attempt to ensure that their rivals do not gain too much ground. Many, if not most, of the big companies are also faced with the difficult problem of motivating personnel who may not stay beyond the date of the moves. Many such workers are tied in for the duration by severance packages that are dependent upon responsible behavior till the end.

However, some aspects of this period of phony war provide, in a way, light relief to tensions behind the massive financial and human decisions that are being made during this extraordinary period in the history of the newspaper industry in the United Kingdom.

It consists of extensive disinformation put out about launches, the likelihood of whose eventual happening is minimal; experimentation with alternative production and distribution arrangements; testing of a wide variety of product innovation; flirtation with color; massive promotion expenditures; and predatory moves by media magnates against others of their kind.

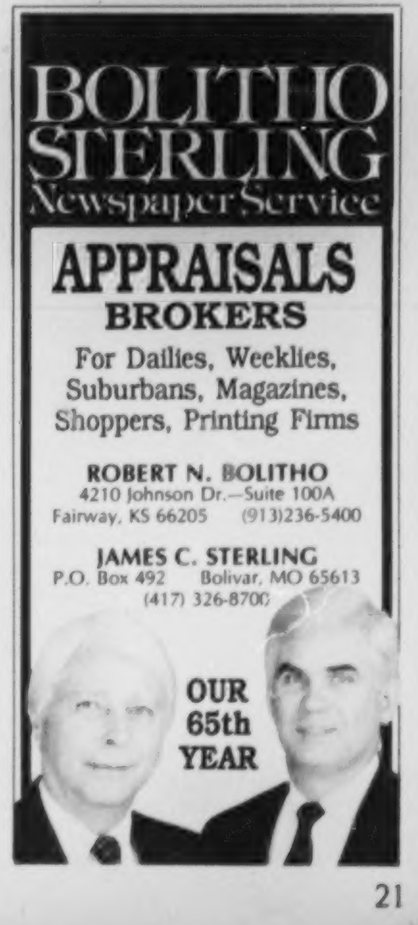
LONG-TERM OUTLOOK. Until now, no more than four national newspapers in Great Britain made a profit in any given year. By the end of this year, however, all are expected to be operating profitably for the first time in memory.

An estimated 1 billion pounds ($1.83 billion U.S.) will have been poured into new plants and into implementing workforce reductions. More than 15,400 jobs in a workforce of 30,000 will have been eliminated.

Financial analysts estimate that this year, revenues of national newspapers will stand at 1.65 billion pounds ($3 billion U.S.) and pre-tax profits at 205 million pounds ($375 million U.S.) against 1.4 billion pounds and 50 million pounds, respectively, in 1985.

The market has demonstrated great strength and stability because of an apparently insatiable appetite for information. It will be well-placed to face the future, even if it might do well to ask this basic question: "Is there a market for my product and, if so, what are its characteristics?"

The palaces that have been raised have, after all, but one purpose—to provide products that people will want and need, not only today but into the 21st century. ☐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OUR 65th YEAR

October consumption breaks all records

October 1987 was a record month for newspaper consumption by all U.S. users and by U.S. daily newspapers.

According to preliminary figures, all users consumed 1,124,143 metric tons. That figure is 3.3-percent above the previous record of 1,088,183 tons set in October 1986.

Consumption by U.S. dailies was 830,248 tons, 3.5 percent (about 28,000 tons) more than the previous record also established in October 1986.

For the first 10 months of 1987, consumption was up 2.9 percent for all users and 4.9 percent for U.S. dailies.

Newsprint inventories of newspapers in ANPA's statistical sample averaged 39 days' supply at the end of October, down one day from the year-earlier level. Mill stocks were up 1.8 percent.

The Canadian mills' operating rate averaged 97 percent for October as well as for the 10 months. U.S. mills operated at 95.6 percent of capacity in October and at 94.5 percent for the 10 months.

Canadian production in October increased 2.3 percent from October 1986, while U.S. production rose 8.3 percent.

Estimated consumption of all U.S. daily newspapers[1]

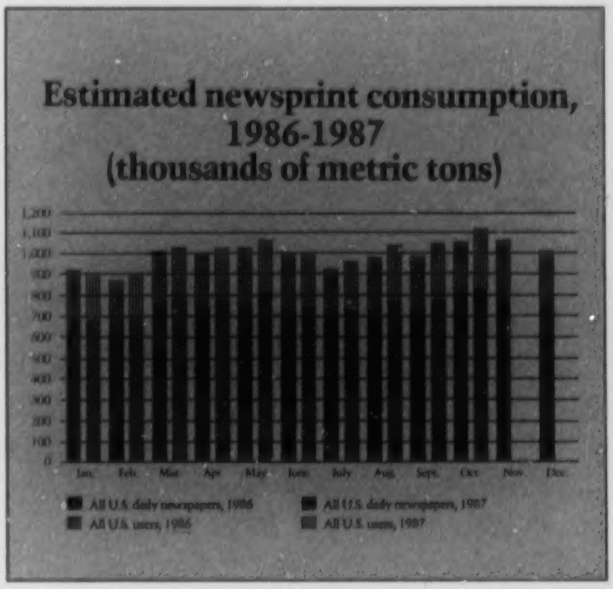
Region	September 1987(r)	September 1986	% Change
Northeast	197,142	191,337	+ 3.0
North Central	166,708	157,788	+ 5.7
South	237,313	222,909	+ 6.5
West	175,894	162,567	+ 8.2
Circulation Size			
up to 25,000	61,141	55,524	+ 10.1
25,001-100,000	161,504	146,340	+ 10.4
Over 100,000	554,412	532,737	+ 4.1
September totals	777,057	734,601	+ 5.8
Nine-month totals	6,821,817	6,491,444	+ 5.1
Region	**October 1987(p)**	**October 1986**	**% Change**
Northeast	214,127	208,033	+ 2.9
North Central	176,558	169,559	+ 4.1
South	254,418	247,495	+ 2.8
West	185,145	176,727	+ 4.8
Circulation Size			
up to 25,000	65,902	59,314	+ 11.1
25,001-100,000	170,748	159,899	+ 6.8
Over 100,000	593,598	582,601	+ 1.9
October totals	830,248	801,814	+ 3.5
Ten-month totals	7,652,065	7,293,256	+ 4.9

Estimated consumption of all U.S. users

	1987	1986	% Change
August totals	1,040,896(r)	997,342	+ 4.4(r)
September totals	1,051,893(r)	998,655	+ 5.3(r)
October totals	1,124,143(p)	1,088,183	+ 3.3(p)
Ten-month totals	10,135,230(p)	9,848,629	+ 2.9(p)

Production

	Canada	U.S.A.	North America
October 1987	826,574	460,906	1,287,480
October 1986	808,371	425,740	1,234,111
Increase	+ 18,203	+ 35,166	+ 53,369
	+ 2.3%	+ 8.3%	+ 4.3%
Ten months 1987	8,077,413	4,409,254	12,486,667
Ten months 1986	7,724,173	4,251,024	11,975,197
Increase	+ 353,240	+ 158,230	+ 511,470
	+ 4.6%	+ 3.7%	+ 4.3%



Estimated newsprint consumption, 1986-1987 (thousands of metric tons)

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
October 1987	592,707	105,517	112,800	811,024
October 1986	594,391	102,320	119,045	815,756
Ten months 1987	5,866,089	963,236	1,238,947	8,068,272
Ten months 1986	5,612,248	914,927	1,217,187	7,744,362
Increase	+ 253,841	+ 48,309	+ 21,760	+ 323,910
	+ 4.5%	+ 5.3%	+ 1.8%	+ 4.2%
From U.S. mills				
October 1987	435,959		19,591	455,550
October 1986	403,531		32,886	436,417
Ten months 1987	4,171,305		239,191	4,410,496
Ten months 1986	3,971,369		278,197	4,249,566
Increase or decrease	+ 199,936		-39,006	+ 160,930
	+ 5.0%		-14.0%	+ 3.8%
From North American mills				
October 1987	1,028,666	105,517	132,391	1,266,574
October 1986	997,922	102,320	151,931	1,252,173
Ten months 1987	10,037,394	963,236	1,478,138	12,478,768
Ten months 1986	9,583,617	914,927	1,495,384	11,993,928
Increase or decrease	+ 463,777	+ 48,309	-17,246	+ 484,840
	+ 4.7%	+ 5.3%	-1.2%	+ 4.0%

Stocks

U.S. publishers[2]	Tonnage	Days' supply On hand	Days' supply In transit
August 1987	904,565	37	6
August 1986	892,786	38	6
September 1987	929,084	37(r)	6
September 1986	904,331	36	6
October 1987	900,642(p)	33(p)	6(p)
October 1986	887,474	34	6
Canadian mills			
October 1987	28[illegible],345	—	—
October 1986	270,208	—	—
U.S. mills			
October 1987	47,832	—	—
October 1986	57,953	—	—

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.

(r) = revised (p) = preliminary

Competition in Canada
On the Rebound

February 1988

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Special Report *To most newspapers, the leading concern continues to be READERS—finding new ones while keeping existing ones happy. For most of the past four decades, there has been a downward trend in reading frequency. However, some recent studies indicate that the decline may have bottomed out, and newspaper executives are now looking for ways to regain some of the millions of nonreaders. They are paying close attention to the efforts of papers that have already dealt successfully with the readership problem. Younger readers are especially being wooed.* **16**

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CHAIRMAN'S CORNER

Minority opportunity tops our industry's agenda

Since I asked here last September for your guidance and cooperation in promoting newspaper opportunities for minorities, there has been a gratifying response. And much work.

You said you wanted full participation by minorities in all newspaper roles and ANPA should help. ANPA has made the commitment to assist—through its 1988 budget and that of the ANPA Foundation, through its new permanent Minority Opportunity Committee led by Jay Smith of the Atlanta Journal and Constitution, and through the enthusiastic work of the industry's joint task force on minorities led by David Lawrence Jr. of the Detroit Free Press.

You also wanted effective tools to achieve the objective of a diversified workforce.

We can get you "how to" books, videos and literature about the excitement of newspapering to use in recruiting.

You wanted really *useful* advice and on-site help, not just more rhetoric. It is a telephone call away, from the staff experts of ANPA and other industry organizations. Talented, sensitive people can come to your offices to present programs on multicultural workforce management, in as expansive or as targeted a way as you need.

You need access to larger pools of minority applicants for entry-level and advanced jobs in all your departments. Help is available to enable you, on your own or with nearby newspapers, to conduct classy, effective, total-newspaper job fairs. Scores of job banks exist, and ANPA is helping to connect and coordinate them so they will be more effective for you.

You asked for literacy programs to enable you to help some minority people in your communities. Experts at ANPA Foundation will answer your call with down-to-earth, proven suggestions on how to lend a helping hand.

You said you needed better statistical yardsticks against which to measure your progress. That will be available when you respond next month to a new national employment survey, conducted by our Minority Opportunity Committee. We will take extraordinary measures to protect the confidentiality of your responses. You and your department managers can help by responding quickly.

You said you wanted advanced, mid-career training programs that aid our efforts to encourage minorities. They exist: at ANPA, the American Press Institute, the Washington Journalism Center, the regional and state press associations, and in individual companies' programs. ANPA Foundation sponsors a minority fellowship program if help is needed.

You expect ANPA, as an association, to do its part. Our staff is now 17-percent minorities. **Presstime** has stepped up its coverage of minority affairs. In April, ANPA's annual Convention will devote a segment of the general session to minorities in newspapers.

I also heard many of you say publishers had to pay more attention, make greater commitments, insist on more progress, design tailored programs for their employees from the resources of many supporting organizations, provide ways not words.

My observation is that you are doing those things. I don't see reluctance by America's publishers to employ and promote minorities. I see frustration that not more has happened, a desire to help and an enthusiasm to get on with it. You're doing it not because it is easy or expedient but because it is right. For newspapers and for our society.

George W. Wilson
ANPA Chairman

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Reviving A Romance With Readers Is the Biggest Challenge For Many Newspapers

BY GENE GOLTZ
presstime staff writer

The four-decades-long decline in readership continues to be the most vexing problem for most U.S. daily newspapers. Like the multi-headed Hydra of Greek mythology, it is a serpent that seemingly cannot be slain; one part of the problem is cut away, only to have others burst forth.

"Readership," says David Easterly, president of Cox Newspapers, "is the most important challenge facing the newspaper industry. We've got all kinds of people everywhere who don't read."

But after a decade of intense and often frustrating scrutiny, industry leaders now concede that the readership conundrum defies a Hercules-like solution. Instead, the focus has shifted to individual newspapers that have achieved readership gains by finding new ways to court readers.

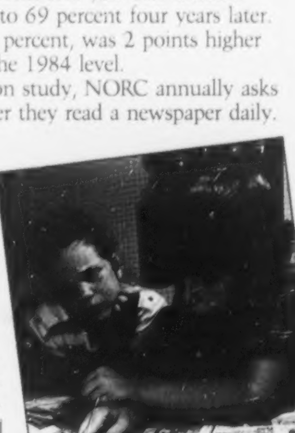
The action now is for other papers to emulate their successes. John R. Harrison, president of The New York Times Regional Newspaper Group and chairman of the ANPA Circulation and Readership Committee, says strategies will vary from market to market. But, he says, publishers and editors everywhere should be guided by one key objective—to produce a newspaper that the local citizenry will regard as "indispensable."

In large part because of what certain innovative papers are doing on their own, spurred by industry studies and recommendations, the readership picture today is not so grim as it was in the 1970s. Several studies show that the rate of decline in newspaper readership frequency has subsided, and two research firms even report a leveling off of that decline.

Those two are Simmons Market Research Bureau Inc., which conducts massive research on newspaper readership nationwide as well as in the largest U.S. markets, and the National Opinion Research Center at the University of Chicago.

Asking people if they had read a newspaper the previous day, Simmons found in 1970 that 78 percent said yes. The number dropped to 73 percent in 1973 and to 69 percent four years later. But the figure reported last year, 65 percent, was 2 points higher than that for 1986, and it equaled the 1984 level.

As part of a generic public-opinion study, NORC annually asks a cross-section of U.S. adults whether they read a newspaper daily. The percentage responding affirmatively decreased from 73 percent in 1967 to 55 percent last year. However, the figure has been basically stable since 1982, when the rate was 54 percent.



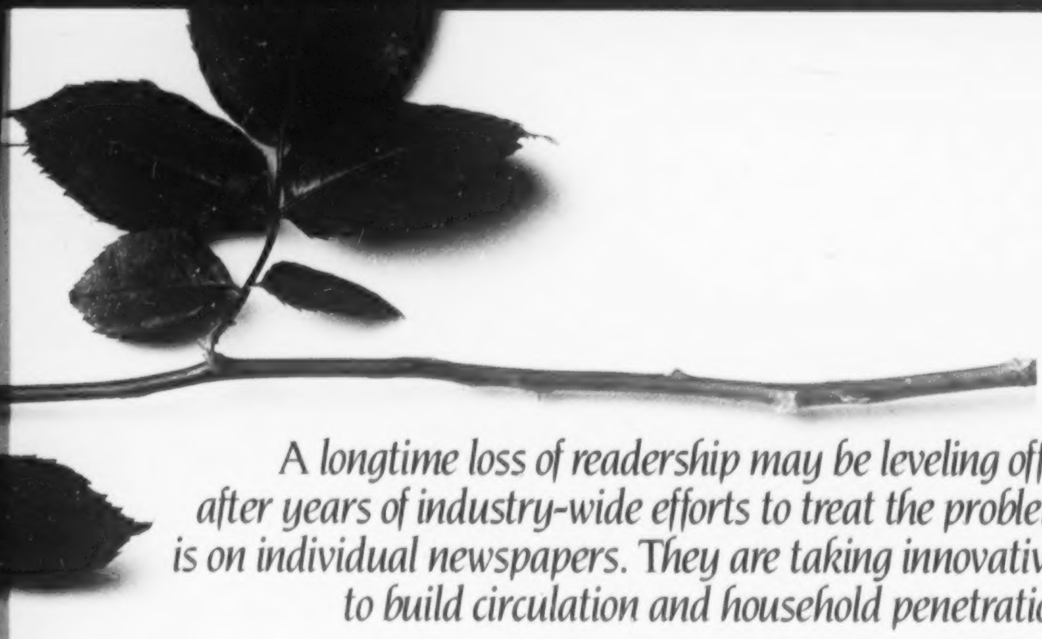
Gerald C. Stone, journalism professor at Memphis State University, says several other studies indicate the decline has halted. Stone in his 1987 book *Examining Readers* says the halt occurred in two stages, involving older adults in 1973-74 and ones aged 18 to 24 in the mid-1980s.

Two top researchers at the Newspaper Advertising Bureau in New York City, Leo Bogart and Albert E. Gollin, say it's clear that newspaper readership frequency is not declining as rapidly as it was in the 1970s. However, they add, it's not certain the decline has ceased altogether.

Gollin, vice president and associate director of research, characterizes the notion of a bottoming out as being "quite close" to data available from NAB's own periodic national studies.

Bogart, executive vice president and general manager, says the "rate of decline has diminished," but this "doesn't mean it has stopped dead in its tracks. . . ." It means "things are not as bad as they were."

According to Bogart, circulation penetration among adults—that is, the number of daily newspapers sold relative to the number of people 18 years of age and older in the population—continues to decrease but at a lesser pace. From an annual rate of 2 percent during 1970 to 1977, the decline slowed to 1.3 percent from 1977 to 1983—the years the industry ran a



A longtime loss of readership may be leveling off. Now, after years of industry-wide efforts to treat the problem, the focus is on individual newspapers. They are taking innovative approaches to build circulation and household penetration.

massive Newspaper Readership Project. Since then, from 1983 to 1987, the decline has been even slower, 0.3 percent.

But another yardstick, measuring the number of weekday papers sold per capita, gives publishers a less hopeful view, Bogart says. It shows steady slippage, from 46 papers per 100 adults in 1970, to 38 in 1980, to 37 in 1986 and to 35 per 100 last year.

SPRINGBOARD TO ACTION. Everyone agrees on one point. There's no single answer to the problem. If there were, readership would be soaring today—and, says journalism professor Stone, "We'd all be millionaires."

Myriad changes in society and in reading habits over the past four decades have contributed to the lag in readership, which has occurred even though contemporary newspapers are generally credited as being better than ever and more responsive to readers' needs.

Some of that quality and responsiveness can be traced to the $5-million Newspaper Readership Project, which urged publishers and editors to produce newspapers that people would be hungry to read each day. Now it is increasingly being recognized that the most immediate and practical path out of the morass may be for troubled papers to study those things that have worked for high-readership newspapers and to emulate them.

For example, after "brainstorming" the readership problem last year, the 36-member ANPA Circulation and Readership Committee decided to highlight the successful readership programs of 28 newspapers that other papers might follow.

"Success Stories: Specific Ways to Gain and Retain Readers," is being prepared by Robert P. Clark, a retired vice president/news for Harte-Hanks Newspapers who was chairman of the Research Committee of the Readership Project.

The new publication, scheduled for release this spring, is an effort to present ways to implement a 1986 study by NAB's Future of Advertising Project, "Readers: How to Gain and Retain Them." That study presented a road map for publishers, a way to think about the problem.

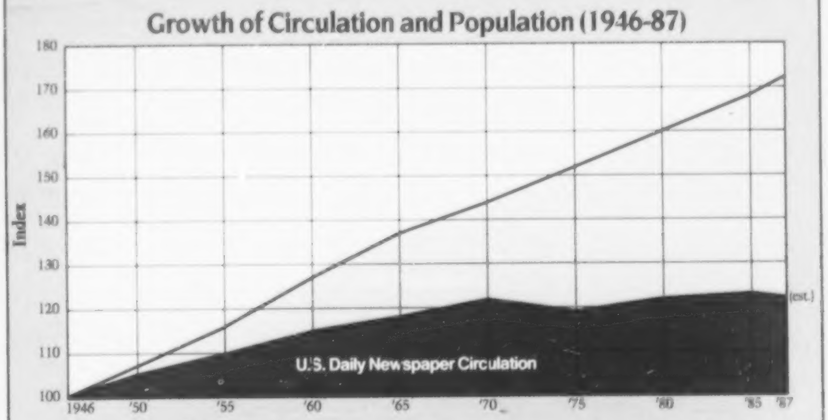
"The array of circumstances facing publishers is so vast and different that every newspaper must chart its own course, tailored to fit its own needs," wrote Burl Osborne, president and editor of The Dallas Morning News and, with Baltimore Sun President and Publisher Reg Murphy, a principal author of the report.

While such efforts as those delineated in "Success Stories" continue, another view of the readership picture will emerge in April with the scheduled release of another major FOA Project report. It will relate to 1977 and 1982 NAB studies and tell how different groups are using newspapers (or not using them), analyze the implications of those findings, and show how the data can be translated into actions.

Although individual approaches differ, one common to all of the successful high-readership papers is that they are courting readers and potential readers as never before. Consider that:

- 69 percent of U.S. and Canadian daily and Sunday/weekend newspapers (representing 82 percent of overall circulation) changed the nature of their editorial content since 1983, according to a 1987 Newspaper Inventory Survey by NAB. The three most frequent changes were increased business coverage by 53 percent, increased sports coverage by 45 percent, and increased ratio of state and local to national and international news by 35 percent.
- 82 percent of newspapers changed graphics or layout since 1983, including the use of more run-of-paper color, different typefaces and industry-standard column widths.
- Many papers now have a daily meeting of all department heads to ensure that the reader is being well-served by every aspect of the newspaper operation—that the stories are written and edited well, that the printing quality is high, and that the circulation service is good. One of the papers doing this is The Dallas Morning News. President and Editor Osborne notes that this is a drastic change from previous years when the editorial department would rarely communicate with circulation, advertising or some other departments. "This has been a tremendous help," he says. "It allows us to adjust our activity on a daily basis."

Growth of Circulation and Population (1946-87)



Year	U.S. Daily Newspaper Circulation	Index Of Daily Circulation	U.S. Population	Population Index
1946	50,927,505	100.0	141,200,000	100.0
1950	53,829,072	105.7	151,300,000	107.2
1955	56,147,359	110.2	164,600,000	116.6
1960	58,881,746	115.7	179,300,000	127.0
1965	60,357,563	118.7	193,200,000	136.9
1970	62,107,527	122.0	203,300,000	144.0
1975	60,655,431	119.3	214,900,000	152.2
1980	62,201,840	122.2	226,500,000	160.4
1985	62,766,232	123.4	238,200,000	168.7
1987	62,500,000 (est.)	122.8 (est.)	243,400,000	172.4

Source: ANPA's "Facts About Newspapers '87," U.S. Bureau of the Census

Lucy Rubb

REASONS FOR DECLINE. If daily newspaper circulation had increased in proportion to the U.S. population between 1946 and 1987, there would be 25 million more readers today. In other words, a 72-percent increase in the nearly 51-million daily newspaper readers of 1946 would have resulted in more than 87 million readers today, rather than the actual figure of about 62.5 million. (See graph, above.)

There are multiple reasons for the loss of readers.

Time-related problems was the leading cause cited by respondents to a 1987 survey, "Love Us and Leave Us," conducted by the American Society of Newspaper Editors. Forty percent of people who ~~had quit~~ subscribing said they had no time to read, an almost equal percentage said the papers kept piling up before they were read, and 30 percent said there were times when they had not read one issue of the paper before the next one was delivered.

Next came delivery problems. Three in 10 of those who had stopped the paper said they were fed up with late or bad deliveries. People also cited billing problems, the cost of the paper and the perception that they were obtaining enough news and other information from television and radio.

The least frequent reason given was dislike for the contents of the paper.

If people do not have time to read the paper, they apparently have plenty of time for television. The A.C. Nielsen Co. says its research shows that the average American home has a TV set on for 6.6 hours a day.

The growth of television has paralleled the decline of newspaper reading. In 1946 the United States lifted wartime restrictions on manufacturing of home television sets, and by 1949 a million sets were in use. By 1987, U.S. Census Bureau figures show, 89.1 million of the nation's 90 million homes had at least one television set.

Circulation and population figures show that daily newspaper penetration averaged just over 1.3 newspapers per household in 1946. It has declined to about 0.7 today.

Yet many studies have found that watching TV news and other television programming actually enhances newspaper reading. "These findings," Stone says in *Examining Newspapers*, "strongly suggest television was not the culprit" in the decline of newspaper reading.

Other suggested causes for the decline, cited by numerous analysts, include illiteracy, a mobile society which has little identification with a local community, and broadened opportunity for social activities other than staying home and reading the paper.

So who are the readers? The Casale Scale, a readership formula developed for Media and Opinion Research, identifies the most faithful ones as those who have resided longest in the community, older people, those with a household income of $50,000 or more, registered voters, the highly educated, married

There Are Plenty of Ideas on How to Gain Readers

Some of the numerous studies, books and reports suggesting what newspapers can do to build readership include the following:

- "Creative Marketing Strategies to Win Readers and Advertisers," an executive summary of a conference for senior newspaper executives held in October 1986. Copies are available at no charge from the ANPA Public Affairs Department, The Newspaper Center, Box 17407 Dulles Airport, Washington, D.C. 20041; (703) 648-1117.
- "Circulation Management and Marketing," a March 1987 report of a task force of the ANPA Circulation and Readership Committee. Copies are available at no charge from the ANPA Public Affairs Department.
- Three publications that are outgrowths of the Newspaper Advertising Bureau's Future of Advertising Project. Copies of "Readers: How to Gain and Retain Them" ($5 each), "Promoting Circulation Sales: An Analysis of 15 Newspaper Circulation Retention Strategies" ($3.25 each), and "Measuring Retention and Circulation Sales Effectiveness" (no charge) are available from the NAB Promotion Department (attention Michelle L. Craddock), 1180 Avenue of the Americas, New York, N.Y. 10036; (212) 921-5080.
- "Love Us and Leave Us: New Subscribers One Year Later," an April 1987 report of the Readership and Research Committee of the American Society of Newspaper Editors. Copies are $7.50 each from ASNE, P.O. Box 17004, Washington, D.C. 20041; (703) 620-6087.
- "Relating to Readers in the '80s," a 1984 study by Clark, Martire & Bartolomeo Inc., commissioned by ASNE and funded by United Press International. Copies are $6 each and available from ASNE.

people, and those most interested in community news. The formula was developed by Anthony M. Casale, director of Media and Opinion Research, a division of the Gordon S. Black Corp. of Rochester, N.Y.

HOW SOME PAPERS ATTRACT READERS. Although researchers agree generally on who does and who does not read the paper, they do not always agree on why the non-readers do not read, or how to attract them. A broad spectrum of effort exists among newspapers today on how to lure the elusive reader.

"Success Stories," the forthcoming ANPA report, found that successful newspapers usually mount a concerted effort in all departments and have a working policy of interdepartmental cooperation. But they also pay careful attention to local needs and demographics. Here are some examples from papers whose efforts have paid off in high readership:

- The Mesa (Ariz.) Tribune (morning, circulation 38,367), whose readership is heavily populated with senior citizens, produces a weekly section titled "Tribune Plus." It features senior citizens' activities, syndicated material from Maturity News Service, and articles on travel and health.
- The Des Moines Register (morning, 214,306) capitalizes on its statewide circulation—and promotes statewide readership—by selecting 10 top students for its Iowa Academic All-State Team. The 1987 winners were selected from 435 high school seniors nominated by their principals. A 12-page section carried stories and pictures about the top 10, plus 52 regional winners.
- The Escondido (Calif.) Times-Advocate (evening, 44,007) pays extra attention to local news by running a daily "Our Town" page that contains vital statistics, academic honors and a feature called "Neighbors," for which readers are encouraged to suggest ideas.
- The Riverside (Calif.) Press-Enterprise (morning, 138,092) goes out of its way to keep subscribers happy. After signing up new subscribers with a seven-day, free-sample offer, the newspaper offers a 60-day money-back guarantee if the customer is not satisfied. Thank-you cards are sent to verify the subscription, and the cards produce useful comments and suggestions, according to Circulation Director Jack T. Koehler.

The newspaper also goes a step further than most by publishing an annual letter to readers at the first of each year. In this year's letter, Editor and Publisher Howard H (Tim) Hays told readers about the new $40-million newspaper production plant under construction, discussed the expanded news and sports coverage for outlying areas, and reminded readers that the $5.50 subscription price, one of the lowest for newspapers of that size in the United States, had not been raised during 1987.

These four newspapers were part of the group selected for inclusion in "Success Stories," but it is not difficult to find tales of success at many other newspapers around the country.

For instance, all of the papers in The New York Times Regional Newspaper Group are enjoying circulation increases that have continued unabated for the past 10 years. Philip K. Hanna, vice president of group circulation, says that circulation increases at the regional dailies have run about 4 percent or more each year for the past 10.

The Times now has 26 dailies and nine non-dailies in 10 states. In half of those states, Hanna says, a Times paper led the state in circulation increases for the 12 months ending Sept. 30, 1987. Total circulation for all 35 regional Times papers increased during the past calendar year by 3.6 percent, to 848,000, he says.

Seymour Topping, director of editorial development for The New York Times Co., says, "We have found in every case that if we improve the quality of the product, get the papers delivered on time and energetically promote circulation, we can improve circulation" numbers.

Improving quality, delivering the papers on time and promoting circulation have paid off in every case.

Seymour Topping
The New York Times Co.

He emphasizes, though, that each of the group's newspapers must address its particular local needs. "The last thing we want to do is create little New York Timeses."

In August 1986 the New York Times Regional Group commissioned Minnesota Opinion Research Inc. to do a study on how to attract marginal readers and non-readers. (See story, p. 22.) The results of that research are still being applied to many of the Times' regional newspapers, but already, says Mary L. Holdt, group designer, "incredible results" have been achieved.

The Leesburg (Fla.) Daily Commercial, for instance, has enjoyed dramatic circulation increases. In the two years preceding Sept. 30, 1987, the evening newspaper's circulation rose from 17,505 daily and 19,693 Sunday to 24,796 and 28,093, respectively, according to Audit Bureau of Circulations FAS-FAX figures.

That was only the beginning. After a complete redesign last fall, the paper's circulation rose to 30,805 daily and 32,414 Sunday by the end of December, says Publisher E. A. Nichols Jr. "Circulation just absolutely went nuts after we redesigned," he says.

Coupled with the new look was additional editorial content. "The newshole was expanded, and we run a minimum of four sections in the paper every day," Nichols says. Greater efforts are being made to give ample coverage to world, national, state and local news, and the Daily Commercial's editorial staff has been enlarged from 24 to 38.

Another Times regional newspaper, the morning Spartanburg (S.C.) Herald-Journal, increased circulation from 47,661 to 55,404 daily, and from 51,997 to 59,294 Sunday in the same 1985-87 period. Publisher David O. Roberts says, "We became very aggressive in circulation. We became very active contacting customers door-to-door and by telephone.

"We've cleaned up our distribution lines in terms of getting the product to the customer on time. I think that went a long way toward assuring people they would have good, dependable, long-time delivery. I think that in itself stopped a lot of normal cancellations. In promotion, we used a lot of other media. We were particularly heavy in outdoor and radio advertising, and we used television to explain our format changes."

Like the Leesburg daily, the Herald-Journal also "dramatically rearranged and revitalized the reader content," Roberts says. "It was a total change, based on what the news management thought the product should be locally. . . . I think the real key is that we organized the paper in such a way that the reader has gotten completely comfortable about where the news is located."

The Herald-Journal also increased the size of its reporting staff—from 36 to 54—and "tremendously expanded" the newshole, according to Executive Editor Carl E. Beck Jr. Both he and Roberts say the newspaper is following a policy that editorial matter will never occupy less than 50 percent of the

John Jaques/The Pueblo Chieftain

Telemarketing personnel help maintain strong circulation of The Pueblo (Colo. Chieftain.

newshole, excluding ad inserts. Roberts says most newspapers average a newshole of about 37 percent.

Beck says all of the syndicated columnists were reviewed; some were canceled and new ones instituted. The paper added an op-ed page plus a religion page, "very popular in the South," he observes.

The increased circulation was accomplished, Roberts says with great satisfaction, without gimmicks. "We have not discounted a single subscription." Furthermore, the paper did not have to expand its geographical reach to pick up more circulation. Roberts says he believes that if a publishing company has a high-quality newspaper and makes readers aware of its worth, they will be eager to subscribe.

The Spartanburg publisher believes those precepts can help other newspapers to staunch declining readership. "I don't care if it's Greenville or Charlotte or anybody in the country," he says, "individually or collectively, we're all in this together."

MORE SUCCESS STORIES. Some newspapers continue to do exceptionally well in defiance of some of the conventional wisdom about readership. The Buffalo News is such a paper.

For one thing, the 311,757-circulation News is a highly successful afternoon paper in an era when the trend is toward morning publication. The News outlasted the morning Courier-Express in a fierce battle that ended with the Courier-Express' demise in 1982. The News' only concession to the a.m. cycle is a street-sales-only "Sunrise" edition.

Even more notable is its high rate of household penetration. ABC figures show that the News reaches 78 percent of the 244,200 households in its city zone. It is one of just 206 dailies to have penetration of 75 percent or more, and most of them are much smaller papers, according to a **presstime** analysis of ABC data. (Morning/evening combination papers were counted as one unit.) Five hundred sixty-nine newspapers were in the 50-74-percent range as of Sept. 30, 1987, while 251 had city-zone penetration of less than 50 percent.

The News has achieved high penetration even though Buffalo is predominantly a blue-collar city, not one heavily populated with the college-educated, high-income people that research has shown are the most faithful newspaper readers.

Executives of the newspaper say their formula for success consists of three main ingredients: a good product, meticulous attention to home delivery and a strong reading habit among Buffalo residents.

Like his counterparts in Spartanburg and Leesburg, News President and Publisher Stanford Lipsey points to the generous amount of space given to editorial content—usually about 50 percent of the product. He also says the paper's many sections and its specifically tailored news for different parts of the circulation area contribute to reader loyalty.

Circulation Director David P. Perona says that when people arrive home in the evening from work, "the newspaper is there waiting for them." Not only that, but the copy has been hand-delivered inside the storm door; no papers are just thrown onto the porch or onto driveways. This exceptional level of service keeps subscribership high, he says.

Perona adds that "Buffalo people are locked into the reading habit." Families tend to be stable, he says, and this builds readership from one generation to another. He also notes that much of the population is represented by people of Polish, Italian and Irish descent, and Buffalo residents have many close personal relationships with one another. "Buffalo is a unique city, (with) a small-town atmosphere in a big city. It's very clannish." People in Buffalo want to know what is going on in their community, he says.

Not even an economic decline in the area has dampened their enthusiasm for the newspaper. When a big Bethlehem Steel plant closed two years ago, there were layoffs and an exodus of workers from the area, but Perona says overall circulation held fast.

Another example of a large-city circulation success story may be taking shape at The Hartford Courant (morning, 226,319). That newspaper is acting to build its circulation base in six suburban "target markets."

The first one selected, north central Connecticut, was the beneficiary of an expanded news, advertising and circulation campaign that began in September 1985. There were subscription campaigns, such as half-price introductory offers. Newspaper carriers were given $15 for each news tip that resulted in a story. The Courant also sponsored concerts, Fourth of July celebrations, community breakfasts attended by editors and town fairs.

At the end of two years, daily circulation in the target area had increased by 31 percent, from 14,977 to 19,632, according to the Courant's circulation department. That increase of 4,655 copies accounted for most of the 5,158-copy gain reported for the entire Courant in the two-year period.

With the growth in circulation has come an increase in advertising in the north central area. It grew 11 percent in 1987, says M.J. Smith, a former assistant state editor at The Times Mirror Co. daily who is now associate publisher for the north-central target market.

Five other target markets have been similarly identified and marked for expansion, with their own zoned editions. In all, 60 reporters have been added to the editorial staff to cover the many town meetings and municipal events in the small communities that characterize Connecticut.

An overriding concern is how to transform people 18-35 into the same kind of habitual newspaper readers their parents and grandparents were.

"Connecticut is a little different from a lot of other places," Smith says. "Lots of people work in Hartford, but they identify with their own suburban community. There's been a joke sometimes that we need a zoned edition for every town in Connecticut."

Courant Publisher Michael J. Davies, a former editor in Kansas City, Mo., and Louisville, says he made a conscious decision to intensify the circulation effort soon after he arrived at the Courant in 1983. "Even though Connecticut is an affluent state," he says, "it has a very low rate of household growth. So we can't rely on an increasing population as the Florida papers do. We have to go out and scrap for our circulation."

In the more sparsely populated inland West, some newspapers have to travel quite a distance to carry on a courtship for readership. Take the Pueblo (Colo.) Chieftain (morning, 50,385). Its circulation region sprawls about 200 miles by 100 miles—a rectangle in south-central and southeastern Colorado that is four times bigger than the entire state of Connecticut. This requires, says President and Publisher Robert H. Rawlings, complete coverage of international, national, regional and local news.

"We have a strong local and regional news report, and a strong sports report," Rawlings says. This is one of the reasons, he says, for the Chieftain's high rate of household penetration in its city zone—76 percent.

In Pueblo as in Spartanburg, the publisher emphasizes that the strong circulation is accomplished without discounts or freebies. "We have tried the gimmicks," Rawlings says. "They may work temporarily, but we find they don't work for us in the long run. So we just emphasize sales, service and a good news report, and that works better."

Stringent standards and training for the corps of mostly youth carriers has kept the rate of customer complaints below 1 percent, he reports, and this in turn has led to a low rate of subscriber turnover or churn.

Also concentrating on churn and on building household penetration is The Evansville (Ind.) Courier (morning, 63,904). The Scripps Howard daily is using a "model district" system built around the theory that a manager in the circulation department should have intimate knowledge of his or her customers. Under the model-district system, each circulation route is analyzed down to the last apartment.

The system was developed by Scripps Howard consultant Ray F. Mack and first tried last year under the guidance of Richard J. Thomas, Courier metro home delivery manager, who added variations to fit market needs. Circulation District 12, consisting of 39 paper routes with penetration varying from 16 to 60 percent, was selected for the initial test.

The newspaper gathered data about households in the district from such sources as the U.S. Census Bureau and the public library, plus their own circulation files. Those identified as non-subscribing were contacted and given a sales pitch.

Conversely, the newspaper can avoid bothering those already subscribing. "You're wasting your time with sequence dialing" of random telephone numbers, Thomas says, while running the risk of hearing someone say, "You guys keep calling me and I'm going to stop taking the paper."

In his model-district study, Thomas also found that some routes were too long. Any that took more than 45 minutes to deliver, he determined, resulted in higher-than-average carrier turnover. And higher turnover invariably resulted in customer dissatisfaction and eventual loss of subscribers. This information resulted in the splitting of several large routes into smaller ones.

The model-district concept was put into practice at the start of 1987, and at the end of the first five months, service errors had declined 32 percent, he says.

The trial also disclosed that where customers were billed through the mail and paid in advance, penetration was higher and churn was down. Thomas is studying whether the same billing technique will increase subscriber retention in other areas.

The system is continuing to be refined. Thomas says once all the information is analyzed, the newspaper will be able to set up realistic sales goals for carriers and district managers and to develop long-range circulation strategies. It also will be used for The Evansville Press, whose circulation and other business functions are handled by the Courier under a joint operating arrangement.

"The model-district plan," he says, "is the map by which newspaper circulation will travel into the next century."

HOW TO SNARE THE YOUNG. If there is one overriding concern in newspaper readership today, it is how to transform people in the 18-35 age bracket into the same kind of steady, habitual daily newspaper readers their parents and grandparents were.

Stone of Memphis State University writes in his new book that researchers have found these as some of the reasons younger people do not read a newspaper: It is considered to be an "old people's habit"; the newspaper is seen "as speaking for the status quo and being against change in society"; it is "cold and impersonal"; and it is "a middle-aged product written and edited by middle-aged people for a middle-aged audience."

John K. Hartman, assistant professor of journalism at Central Michigan University, believes newspapers can increase readership among younger people by adopting the flair and style of USA Today. Hartman says members of the "television generation" are more attracted to the color, graphics and short, snappy stories of the Gannett Co. national daily than they are to conventional newspapers with "black ink on white paper."

Many local dailies are, in fact, using more color and graphics, partly as an effort to attract younger readers. Other approaches are also being tried.

Columbia (S.C.) Newspapers Inc., publisher of The

State and the Columbia Record, is concluding a two-year "Yuppie Campaign" based entirely on marketing. It involved a series of television ads coinciding with in-house newspaper promotion ads aimed at "young, upwardly mobile professionals."

The series of ads "featured a 'Yuppie' who's trying to get ahead," says Barbara C. Whittington, marketing research manager. "The gist of the ads was that they'd get ahead faster and better if they read the newspaper."

The campaign appears to be paying off, particularly in Sunday readership among young people in the Columbia area. While combined morning and evening circulation of the two Knight-Ridder Inc. dailies rose from 146,802 to 147,764 in the 24 months prior to Sept. 30, 1987, Sunday circulation of The State climbed from 149,462 to 153,515. Moreover, the 1987 Simmons Major Market Research report showed that 77.6 percent of people 18-24 read the most recent edition of the Sunday paper, compared with 67.5 percent of people in that age group two years earlier. Among those between the ages of 25 and 34, the increase was even more dramatic—from 67.8 percent to 84.6 percent. "It appears," Executive Vice President and General Manager R. Sidney Crim told employees in a recent report, "our so-called 'Yuppie' campaign has been successful."

The Observer & Eccentric Newspapers, a group of 12 twice-a-week suburban newspapers published in communities around Detroit, made an editorial adjustment to woo 18-to-34-year-olds. A "Street Scene" section in Monday editions specializes in articles of interest to younger people: why the Beta format is losing out to VHS in the home videocassette market, how to buy a new "stripped down" car without expensive options, and how laser-powered holograms are entering the 3-D market. Each issue also contains a full page of music news, including the latest on local rock bands. A generous amount of space is given to sports, movie reviews, and columns on subjects such as how young widows are coping and how to behave in the first job interview.

Susan M. Mason, "Street Scene" coordinator, says editorial ideas are generated by a committee consisting of newspaper staff members in the 18-to-34 age group, plus staffers of other ages who may wish to offer ideas. Sales "have perked up" since the special section was introduced, she says.

Even as they stalk elusive young people, newspapers are not forgetting the folks who continue to make newspapers the nation's leading medium for news and advertising—people over 35. One indicator of that is the success of the new Maturity News Service. And, of course, the much-heralded maturing of the "baby boomers" has long been seen as a potential big boost for newspaper readership that, it seems, always is right around the corner.

Publishers and editors are also watching other demographic patterns for telltale signs that the readership decline might someday be reversed. They are wondering whether there will be a slowdown in the formation of non-family households, which in general have a poor record of newspaper subscribership. The number of such households in the United States increased from less than 8 million in 1960 to about 25 million in 1987. In making its projections, the U.S. Census Bureau charts three different scenarios leading to wildly different numbers for the year 2000: 28 million, 34 million and 40 million.

But whatever happens demographically, there is no question that newspapers can attract more readers if they make the right effort, says Osborne of The Dallas Morning News.

"There's no free lunch," he says. "If you are willing to publish and deliver a newspaper product people feel they want and must read, then they'll buy it. . . . The newspaper will move up on the list of priorities in their lives. If reading the paper is more important than watching another 30 minutes of TV, then that's what they'll do." ☐

Ten 'Keys for Attracting Readers'

MORI Research of Minneapolis has developed a checklist of 10 "keys for attracting readers to newspapers." Using that 10-point list as a foundation, MORI and The New York Times Regional Newspaper Group compiled a 56-page booklet giving examples of how newspapers have courted readers.

The "keys," plus selected examples for each, suggest that newspapers provide:

Utility, or useful information. The Chicago Tribune publishes a weekly "Sports Weekend" page summarizing the upcoming weekend's professional and top college sporting events.

A **frame of reference**, to help people better understand news stories and even become more familiar with the newspaper itself. The Philadelphia Daily News publishes a column called "The Savvy Reader" that helps explain the news in simpler ways to help people who have "marginal reading ability."

Local ties. These can be highlighted through zoned editions, summaries of local events such as a column called "Who, what, when, where, why" published by The Ledger of Lakeland, Fla., and features on local communities such as the Seattle Post-Intelligencer's "Neighborhood Profiles."

Multiple points of entry, or the "liberal use of pictures, graphics and sidebars" to "attract readers to stories who might otherwise skip over them." A story in the St. Petersburg Times on the baby boomers' future "retirement crunch" was illustrated with two large graphics that clearly presented key facts from the story.

A **quick read** by using devices such as capsules and indexes. The Oregonian of Portland runs story summaries in a "News in brief" column that doubles as an index. The Bakersfield Californian offers a "Week in Review" column providing perspective on the previous week's news.

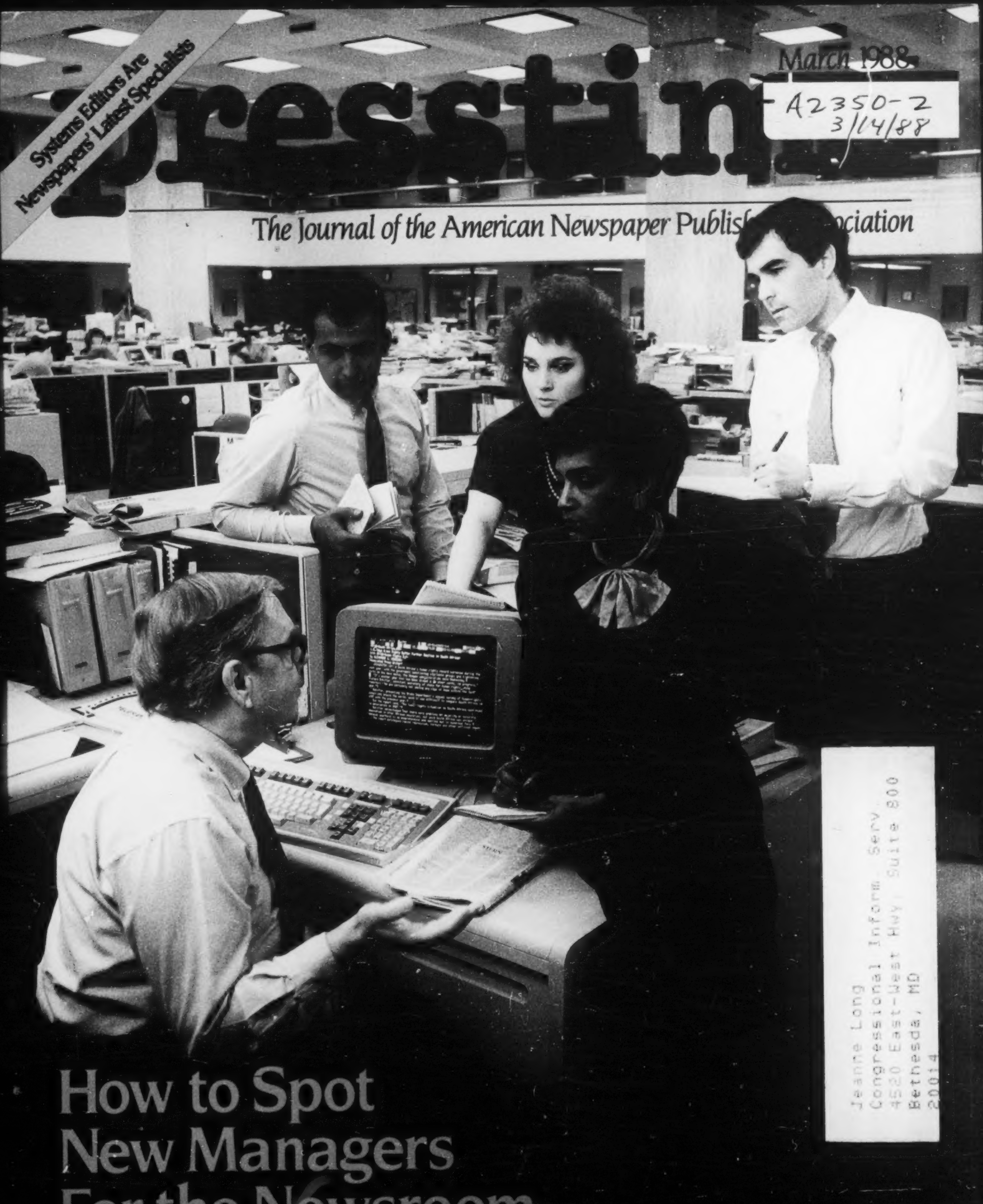
More **escape**, or upbeat material designed to give people "a lift or (to) take their minds off problems." A "nostalgia" story in the San Jose Mercury News on classic cars, headlined "Chrome Sweet Chrome," was one such feature.

Grist for conversation, stories to give people something to talk about. A humorous piece in The Charlotte (N.C.) Observer discussed the possibility of uniting the Carolinas into one state, "New Carolina."

Must reading to reach people in high socioeconomic brackets, even though the stories may have low general appeal. Included are such things as sharp, local business reporting as appears in The Sun of San Bernardino, Calif., and software reviews in The Tampa Tribune.

Tone that matches content through writing and graphics. The Milwaukee Journal's "Green Sheet for kids" makes liberal use of cartoons, sketches and photographs.

Broadly based features tailored to local interests. The Star Tribune of Minneapolis carries a "Variety" feature page containing stories on wide-ranging topics.



Systems Editors Are Newspapers' Latest Specialists

March 1988

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The Journal of the American Newspaper Publis ociation

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How to Spot New Managers For the Newsroom

presstime

INDEX VOLUME 10, NUMBER 3 MARCH 1988

Special Report *Great reporters and copy editors do not always make great newsroom managers. Often, they face a rough transition when they begin supervising their former peers. To build leadership and morale, newspapers are devising systematic approaches to develop their first-line managers. The tools are careful performance appraisals, career-planning sessions, training and even escape routes for those unsuited to their management roles. Effectively used, those tools can find and cultivate those with the best "people management" skills.* 18

New computer whizzes *Most systems editors began as journalists but turned technical to help their newsroom computers run smoothly.* 6

Curbing ads *The government's advertising commandments include hundreds of "Thou shalts" and "Thou shalt nots"—and they are increasing.* 10

The press run conundrum *How do newspapers plan, count and deliver the right number of copies? With coordination, technology—and a little luck.* 14

Untapped prospects *Newspapers may be missing out on $1 billion in ad revenues from legal, health-care and other professionals.* 24

Commerce in color comics *Few newspapers print their own Sunday comics, resulting in turf battles among commercial printers that do.* 28

Press armor *Shield laws still help reporters to fight subpoenas, but such laws are taking a back seat to court rulings these days.* 34

Profile: Jean H. Otto *This late-bloomer in the newspaper industry has set out to nudge the nation's conscience on First Amendment issues.* 36

Essay: Modern managers *William L. Winter of the American Press Institute hopes newsrooms won't discard their souls in the rush toward efficiency.* 38

INAME Conference *In New Orleans, advertising executives focused on "all that jazz" for which advertisers spend billions in newspapers.* 50

Hot copies *Facsimile machine vendors have seen a 30-percent growth rate in their market, partially due to increased newspaper use.* 56

New ANPA directors *Three seasoned newspaper executives will be nominated for ANPA Board slots at April's Convention in Honolulu.* 64

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(Cover photo by Robert Rathe.)

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CHAIRMAN'S CORNER

Replies to membership survey will help keep ANPA in tune with industry needs

This is important, so I will keep it brief.

In a few weeks you will receive an ANPA membership survey from the Gallup Organization. Please answer it and return it promptly.

This is the first time in 10 years ANPA has gone to its membership with a broad survey to ask how it is doing, what it should do more of and where the Association ought to head in the future.

Following the last major survey, ANPA made a number of fundamental changes. It increased member participation in committees and gave the committees more influence. It adopted a formal planning process that involves staff, committees and Board of Directors. It made the Reston, Va., building a home for other newspaper associations. It expanded legal and public-policy staffs and increased ANPA attention to governmental actions. It strengthened the role of the Board and the participation of directors in Association affairs. It consolidated all technical and research activities in Reston. It created **presstime**.

George W. Wilson

ANPA is an important partner in our efforts to produce better newspapers. It brings us together to deal with forces larger than any one newspaper. It helps us keep a strong and free press.

But ANPA is effective only if it is relevant. It cannot waste the resources you provide it on unessential work. And you have the ultimate responsibility to help assure its usefulness.

Please take the time to offer your guidance when you receive the questionnaire.

I assure you your views will be deeply appreciated and closely studied.

George Wilson

George W. Wilson
ANPA Chairman

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Ontario strike ends

Striking members of the Lumber & Sawmill Workers Union agreed to a three-year contract at the Kapuskasing, Ontario, mill of Spruce Falls Power & Paper Co. Ltd. It was along the lines of an earlier settlement at Abitibi-Price Inc. that called for wage increases of 25 cents an hour in the first year, 45 cents an hour in the second and 4.5 percent in the third.

The mill continued to operate during the strike, which began Jan. 12 and lasted nearly three weeks.

Another three-year settlement was reached when members of the Confederation of National Trade Unions ratified a new contract at Domtar Inc.'s Donnacona, Quebec, newsprint mill. It, too, is similar to the Abitibi-Price pact.

The mill was closed for about three days in January because of a lock-out by the company.

In the United States, a settlement has not been reached between the Association of Western Pulp & Paper Workers and Boise Cascade Corp. at its Steilacoom, Wash., mill, where the labor contract expired in 1987 [**presstime**, Jan. 1988, p. 61]. The mill has made its final offer to workers.

Financial report of paper companies, 1987 vs. 1986
Net income (in thousands of dollars)

	1987	1986	% Change
Abitibi-Price Inc.	$125,700	$107,300(a)	+17.1
Boise Cascade Corp.	182,990	101,540	+80.2
Bowater Inc.	81,140	49,444	+64.1
Champion International Corp.	382,000(b)	201,000	+90.0
Consolidated-Bathurst Inc.	214,400(b)	49,400	+334.0
Great Northern Nekoosa Corp.	200,600	85,300(a)	+135.2
Kimberly-Clark Corp.	325,000	269,000	+20.8
MacMillan Bloedel Ltd.	280,600	178,300(b)	+57.4
Weyerhaeuser Co.	446,623	276,700	+61.4

(a) including extraordinary loss; (b) including extraordinary gain; ( ) = loss

NEWSPRINT NOTES

- Normick Perron Inc. and Forex Inc. are studying the feasibility of **building a $400-million newsprint mill** at Val d'Or, Quebec. The companies said the project hinges on a number of factors, including financing, substantial government assistance and wood-supply agreements.

The 225,000 metric-tons-a-year mill would be 51-percent owned by Normick Perron and 49-percent owned by Forex, both of which are lumber producers.

- F.F. Soucy Inc. is **rebuilding a newsprint machine** at its Riviere-du-Loup, Quebec, mill. The work, scheduled for completion late this year, will boost annual capacity by 20,000 metric tons. Additional improvements in 1989 will add 4,000 tons to annual capacity.

The company also may rebuild another machine, adding 9,000 tons a year. This project would cost about $7 million and would be completed in 1991.

- CIP Inc. and seven unidentified partners recently **formed a new company** to own and operate the 230,000 metric-tons-a-year newsprint mill under construction at the site of CIP's Gold River pulp mill in British Columbia.

CIP will be the major stockholder in the company, which is called Gold River Newsprint Ltd. Partnership.

Start-up of the mill is planned for the fall of 1989, and CIP will be responsible for its operation [**presstime**, Dec. 1987, p. 68].

- Signal Capital Corp. will **hold title** to the 203,000 metric-tons-a-year newsprint mill under construction at Grenada, Miss. It will lease the mill back to Newsprint South, a subsidiary of Mississippi Chemical Corp., when construction is completed.

Signal and the Jackson (Miss.) Bank for Cooperatives are putting up the money for the mill's construction. Start-up is planned for late summer 1989 [**presstime**, Aug. 1987, p. 54].

New mills aside, tight supplies of newsprint are projected into the 1990s.

Crown Forest purchase completed

New Zealand-based Fletcher Challenge Ltd. now owns 100 percent of Crown Forest Industries Ltd. It recently acquired the last 4 percent of Crown's stock.

The company also increased its holdings in British Columbia Forest Products Ltd. from 48 to about 69 percent.

According to Ian Donald, FC's executive director in North America, a merger of Crown and British Columbia is not in sight but remains an option [**presstime**, March 1987, p. 73].

ANPA lab uses new color scale

The ANPA newsprint laboratory has switched to the International Commission on Illumination, or CIE, L*a*b* scale to determine specific colors of newsprint.

According to Doris E. Kleintop, technical supervisor/newsprint quality, the CIE L*a*b* scale is becoming standard throughout the paper industry.

The Helmholtz method, which ANPA formerly used, involved calculating the dominant wavelength of the newsprint in order to determine its hue, Kleintop said.

Color is the composition of visible wavelengths and intensities. CIE L*a*b* uses a scale of equal increments. Because it utilizes a uniform scale rather than a dominant wavelength, the Pulp and Paper Research Institute, and others in the industry believe its findings are easier to interpret.

Control of Abitibi

Olympia & York Developments Ltd. has again acquired controlling interest in Abitibi-Price Inc.

The company, which has been buying up shares since the stock market crash last October, now owns about 75 percent of Abitibi-Price. It once owned 93 percent but sold most of its Abitibi-Price holdings to Gulf Canada Ltd. in 1986 [**presstime**, Jan. 1987, p. 66].

Statistics delayed

Newsprint statistics for January were not available at press time. They will be published in the April issue.

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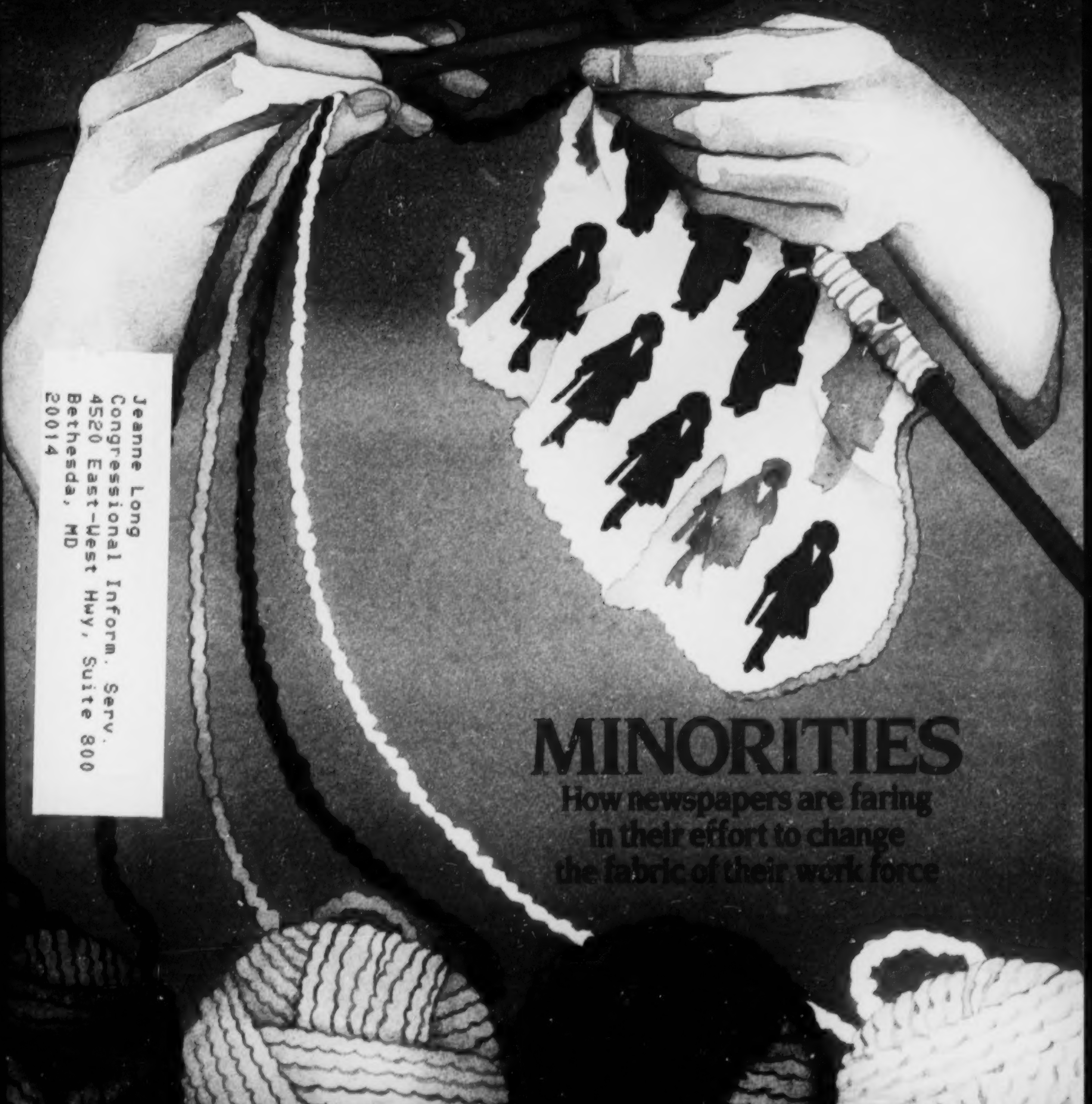
pril 1988

Press Sales Boom, Especially U.S. Models

The Journal of the American Newspaper Publishers Association



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MINORITIES

How newspapers are faring in their effort to change the fabric of their work force

presstime

INDEX VOLUME 10, NUMBER 4 APRIL 1988

Special Report *Despite vigorous efforts on the part of the newspaper industry, newspapers are making slow progress toward meeting minority-employment goals. But progress is being made. Efforts are growing to draw more minorities into departments besides the newsroom, where much of the effort in the past has been focused. Another new challenge is retaining minority staffers. Newspaper executives who are leading the movement toward more minority representation say a diverse work force not only is morally right, but it also makes good business sense.* **24**

Press On! *North American newspapers will continue purchasing presses but at a slower clip. Foreign-currency exchange rates favor U.S. manufacturers.* **6**

Acres of agate *Newspapers are investing efforts in trying to cope with the flood of financial data. Some tailor stock listings to their individual needs.* **12**

Association lobbyists *The top staffers of state newspaper organizations juggle diverse duties, but watching the legislature is a constant chore for many.* **16**

Containing health costs *Newspapers are trying to find ways to cool down employee health-care costs that are running feverishly high.* **20**

Falwell fallout *The U.S. Supreme Court's Hustler Magazine v. Falwell decision will prevent "end runs" around libel law.* **34**

Mailers' newspaper ties *Two direct-mail companies competing with newspapers for preprint business have newspaper-company parents.* **36**

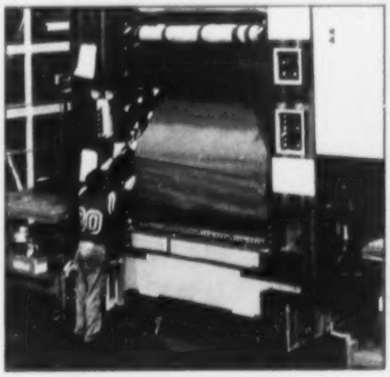
Profile: George E. Curry *This Chicago Tribune reporter helps minority students enter journalism. A tough teacher, he brings out their best.* **37**

Essay: Correct Miss-take *Newspapers erred in eliminating courtesy titles, says Joseph A. Mehan, who calls for a return to a "civilized practice."* **38**

Postal rate victory *The Postal Rate Commission proposes a rate package in line with ANPA recommendation. Direct mailers face a steep increase.* **52**

Flexo fest *More than 300 people turn out at an ANPA-sponsored symposium to hear the latest about newspaper flexographic printing.* **64**

102nd ANPA Convention *The Association's annual Convention in Honolulu April 25-27 will highlight Asia-Pacific issues. Here's the program. Aloha!* **78**



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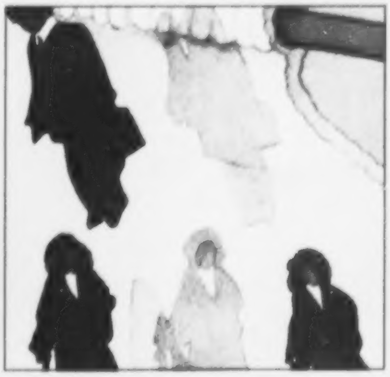

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CHAIRMAN'S CORNER

Diligent work rewarded in three key decisions

Three recent federal government decisions will have a favorable effect on important interests of newspaper people. Two were judicial; one was administrative. All say much about both our interests and the way ANPA serves them.

The postal rate decision (see story, p. 52) called for a 21.7-percent increase in the lowest third-class mail rate (and 26.3-percent in the pound rate) while boosting first class 13.6 percent. ANPA had supported the former and urged a slightly lower first-class rate hike. The U.S. Postal Service built third-class mail volume with low rates and modest increases. USPS did it by under-accounting for overhead costs and third-class's value to users. Meanwhile, first and second-class rates soared. During a half-dozen years, ANPA carefully developed its arguments and buttressed them with expert studies to encourage a more equitable determination of rates. The ANPA difference was the sustained investment of time, talent and resources.

George W. Wilson

The telecommunications decision (see story, p. 53) clearly and brilliantly confirmed an important principle that will assure variety and competition in the promising field of electronic information. Judge Harold H. Greene opened opportunities for telephone companies to develop powerful new transmission networks for information. But he instructed telephone companies to provide a neutral network, letting only independent third parties generate and assemble the information. Here, the ANPA difference was the "Diversity Principle," which holds that the monopoly owner of the conduit must be denied any opportunity to manipulate content or access to information in favor of its own interests. It is now firmly in the law. And the phone companies have a clear mandate to encourage a wide variety of information services from many companies over modern, electronic gateways.

The First Amendment decision (see story, p. 34) saw a unanimous U.S. Supreme Court affirm the value to our society of free expression, even when that expression is offensive. The publication of opinion about public figures, even if opinion stoops to disgusting ridicule, was protected against creative judicial punishment because no constitutionally harmless distinction can be made between distasteful and "responsible" free speech. The ANPA difference was in our advising the lawyer who argued the case, joining in and coordinating the filing of briefs and bolstering the commitment of several ANPA-member newspapers to join the battle. Those newspapers chose to fight for a principle they revere even when the case involves a principal they did not admire.

The first decision cited above helps restore balance and rationality to the way a major governmental department treats its customers and competing interests in the private sector. The second helps assure that a new information medium will enjoy the diversity and access that has marked traditional media—the public's best guarantee of honest information. The third strengthened our nation's fundamental right—free speech. Without the free flow of information, unmanipulated by government and government-created monopolies, all other liberties are imperiled.

George Wilson

George W. Wilson
ANPA Chairman

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Ranks of 25-cent dailies are dwindling, and the predominant 50-cent Sunday paper is history

While the predominant price for daily newspapers remained 25 cents in 1987 for the seventh straight year, there continued to be a notable increase in the number costing 35 cents or more, according to ANPA's annual survey of single-copy, city-zone, street-sale prices. The predominant price of Sunday papers rose from 50 cents to 75 cents.

The survey included 1,760 newspapers in the United States, Canada, the Bahamas, Bermuda, Guam, Puerto Rico and the Virgin Islands.

It showed that 1,037, or 58.9 percent, of weekday editions cost a quarter a copy in 1987, compared with 1,144, or 64.3 percent, a year earlier [**presstime**, April 1987, p. 56].

Increasing last year were the number of 35-cent newspapers (from 344 to 456), 40-cent papers (22 to 24) and 50-cent papers (15 to 35).

Newspapers selling for 15 cents decreased (from 18 to 16), as did those costing 20 cents (52 to 35) and 30 cents (177 to 156). There is now only one daily newspaper selling for a dime in the survey area—the Leesburg (Fla.) Daily Commercial.

Newspaper prices slightly exceed CPI

Between January 1987 and January 1988, the average price of a newspaper rose 4.1 percent while the consumer price index increased 4 percent, according to the U.S. Department of Labor's Bureau of Labor Statistics.

The previous year, the average price of a newspaper increased 4 percent and the CPI 1.4 percent [**presstime**, April 1987, p. 56].

Of the 822 Sunday papers included in the survey, 263, or 32 percent, cost 75 cents. This represented a slight increase from 1986 when 257 Sunday newspapers, or 31 percent, were at that price.

Meanwhile, the number of 50-cent Sunday papers dropped from 273 in 1986 to 235, or 29 percent, last year. The 50-cent price had been predominant since 1981.

The number of Sunday papers selling for less than 50 cents also declined, from 92 to 86, while the number costing more than 75 cents climbed from 166 to 224.

Prices of Sunday papers ranged from a quarter—there were 61 at that level—to $1.25. The ranks of those costing that maximum amount more than doubled last year, from 14 to 30. There was also a significant increase in the number of $1 Sunday papers; the total at the end of 1987 stood at 185, 41 more than a year earlier. ☐

Price per single copy of daily newspapers—1987

	15 cents	20 cents	25 cents	30 cents	35 cents	40 cents	50 cents	Total[1]
Alabama	2	–	24	–	–	–	1	27
Alaska	–	–	3	–	4	1	–	8
Arizona	1	–	8	–	9	–	1	19
Arkansas	–	–	30	–	2	–	–	32
California	–	–	107	3	7	–	–	117
Colorado	–	3	20	–	2	–	–	25
Connecticut	–	–	6	9	8	–	–	23
Delaware	–	–	–	–	3	–	–	3
District of Columbia	–	–	2	–	–	–	1	3
Florida	–	1	41	–	5	–	–	48
Georgia	–	–	33	–	2	–	–	35
Hawaii	–	–	3	–	1	2	–	6
Idaho	–	–	8	1	3	–	–	12
Illinois	–	1	33	14	21	–	1	70
Indiana	–	1	41	9	22	–	–	73
Iowa	–	–	11	3	20	–	3	37
Kansas	4	2	36	1	3	–	–	46
Kentucky	–	–	13	–	11	–	–	24
Louisiana	1	2	15	2	8	–	–	28
Maine	–	–	–	2	7	–	–	9
Maryland	–	–	11	2	2	–	–	15
Massachusetts	–	1	13	11	19	–	1	45
Michigan	1	1	28	6	16	–	–	52
Minnesota	–	–	6	1	18	–	–	25
Mississippi	–	1	16	–	5	–	1	23
Missouri	–	2	35	3	6	–	–	46
Montana	–	–	2	–	9	–	–	11
Nebraska	–	–	15	–	4	–	–	19
Nevada	–	–	6	–	1	–	–	7
New Hampshire	–	–	–	6	3	–	–	9
New Jersey	1	–	22	–	2	–	–	25
New Mexico	–	1	18	–	1	–	–	20
New York	–	–	17	15	35	–	2	69
North Carolina	2	2	49	–	1	–	–	54
North Dakota	–	–	1	–	9	–	–	10
Ohio	–	4	46	15	22	–	–	87
Oklahoma	–	–	42	–	10	–	–	52
Oregon	–	–	12	–	7	–	–	19
Pennsylvania	2	–	36	31	23	–	–	92
Rhode Island	–	–	–	2	5	–	–	7
South Carolina	–	–	16	–	–	–	2	18
South Dakota	–	–	11	1	2	–	–	14
Tennessee	–	3	15	–	10	–	–	28
Texas	–	–	95	2	9	–	1	107
Utah	–	–	2	1	–	–	3	6
Vermont	–	–	3	2	2	–	1	8
Virginia	–	4	27	–	4	–	–	35
Washington	–	–	17	–	7	–	1	25
West Virginia	1	2	13	2	4	–	1	23
Wisconsin	–	–	7	1	26	–	1	35
Wyoming	–	1	9	–	–	–	–	10
Totals								
U.S.	15	32	1,024	145	400	3	21	1,641[1]
Canada	1	3	9	10	55	19	14	111
Bahamas	–	–	–	1	–	–	–	1
Bermuda	–	–	–	–	1	–	–	1
Guam	–	–	–	–	–	1	–	1
Puerto Rico	–	–	4	–	–	–	–	4
Virgin Islands	–	–	–	–	–	1	–	1
Grand Totals	16	35	1,037	156	456	24	35	1,760[1]

---

[1] Includes one newspaper selling for 10 cents (in Florida)

Price per single copy of Sunday newspapers—1987

	25 cents	35 cents	50 cents	60 cents	75 cents	$1.00	$1.25	Total[1]
Alabama	3	–	8	–	9	1	–	21
Alaska	–	–	2	–	1	–	–	4
Arizona	–	–	2	–	7	2	–	11
Arkansas	2	2	11	–	1	–	–	16
California	3	–	26	–	18	12	–	59
Colorado	–	–	4	–	5	1	–	10
Connecticut	–	–	–	–	5	4	1	11
Delaware	–	–	–	–	1	–	1	2
District of Columbia	–	–	–	–	–	–	1	1
Florida	3	1	16	–	8	5	1	34
Georgia	–	–	5	–	7	4	–	16
Hawaii	1	1	1	–	1	–	1	5
Idaho	1	–	2	–	4	2	–	9
Illinois	–	2	3	1	5	11	2	24
Indiana	–	–	1	–	9	9	1	20
Iowa	1	–	–	–	3	3	3	11
Kansas	1	1	10	–	2	3	–	18
Kentucky	1	–	3	–	4	4	–	13
Louisiana	4	–	10	–	7	1	–	22
Maine	–	–	–	–	1	–	–	2
Maryland	–	–	1	–	2	1	1	6
Massachusetts	–	–	–	–	3	5	2	12
Michigan	–	–	–	–	11	4	–	15
Minnesota	–	1	3	2	1	3	1	12
Mississippi	1	–	1	–	7	2	1	12
Missouri	2	–	3	1	2	2	–	11
Montana	–	–	1	–	3	2	1	7
Nebraska	–	1	4	–	1	1	–	7
Nevada	–	–	1	–	–	3	–	4
New Hampshire	–	–	–	–	2	–	–	4
New Jersey	1	2	6	1	5	3	–	19
New Mexico	1	–	4	–	5	3	–	13
New York	–	–	1	–	10	20	4	35
North Carolina	–	–	8	–	16	5	–	29
North Dakota	–	1	1	–	2	2	1	7
Ohio	1	–	7	3	14	7	–	32
Oklahoma	13	1	19	–	7	–	–	41
Oregon	1	–	2	–	5	2	–	10
Pennsylvania	–	–	4	–	12	9	–	28
Rhode Island	–	1	1	–	–	–	1	3
South Carolina	–	–	3	–	6	2	–	11
South Dakota	–	–	1	–	1	2	–	4
Tennessee	1	1	3	–	6	2	2	15
Texas	20	3	35	–	24	12	–	94
Utah	–	–	–	–	2	3	–	5
Vermont	–	–	–	–	1	1	1	3
Virginia	–	–	5	1	3	6	–	15
Washington	–	–	2	–	4	9	–	15
West Virginia	–	–	2	–	5	3	–	10
Wisconsin	–	–	1	–	2	5	4	12
Wyoming	–	–	3	–	–	1	–	4
Totals								
U.S.	61	18	226	9	260	182	30	804[1]
Canada	–	1	7	1	1	3	–	14[1]
Bahamas	–	–	–	–	–	–	–	0
Bermuda	–	–	–	–	–	–	–	0
Guam	–	–	1	–	–	–	–	1
Puerto Rico	–	–	1	–	2	–	–	3
Virgin Islands	–	–	–	–	–	–	–	0
Grand Totals	61	19	235	10	263	185	30	822[1]

---

[1] Includes newspapers selling for 30 cents (one each in Minnesota and New Jersey), 40 cents (one each in Alaska, Kansas, Kentucky and Missouri), 55 cents (one in Canada), 65 cents (one in Oklahoma), 70 cents (one each in Connecticut and Massachusetts), 85 cents (one in Iowa and three in Pennsylvania), 90 cents (one in Maryland and two in New Hampshire), and 95 cents (one each in Maine and Massachusetts)

National dailies ask exemption from county reports

Three of the four U.S. national general-circulation daily newspapers are objecting to a major rule change by the Audit Bureau of Circulations that would require them to tabulate their circulation county-by-county. And the fourth says chances are 50-50 that it, too, will have to seek relief.

The Wall Street Journal, The New York Times and The Christian Science Monitor intend or have already applied for exemptions from the rule that is now part of ABC's revised format for its annual Audit Reports and its Publisher's Statements. The revisions were approved Feb. 27. Under the previous rules, national newspapers were exempt from the county reporting requirement [presstime, October 1987, p.56].

Dow Jones & Co., which owns The Wall Street Journal, has sought an exemption to the new rule, but it had not heard back from ABC by late-March. It is considering presenting its views again May 17-20 when the ABC Board of Directors meets in Boston, said spokesman Danforth W. Austin.

The New York Times will seek an exemption from the rule at that meeting, said spokeswoman Nancy Nielsen.

And The Christian Science Monitor intended to seek an exemption by the end of March, said Circulation Director David E. Els.

USA Today's vice president for circulation, Larry Lindquist, called the county reporting an "awesome task," with which the paper will attempt to comply. However, he predicted that chances of success are no better than even.

"It's a problem of logistics and how to break all those numbers down," he said. If the paper is unable to devise an accurate system, an exemption will be sought.

Although the new rule doesn't take effect until next March, Lindquist said, a reporting system should be operating by September in order to count copies for the six-month reporting period of Oct. 1 through March 31. Meg Laidlaw, manager of communications for ABC, said the county reporting change was sought by advertisers. She said 99 percent of the ABC newspapers already report circulation by county and advertisers wanted it for all.

ABC's new report format will be used for the first time with the Publisher's Statements for the six-month period that ends Sept. 30 of this year. All Audit Reports issued after that date are to be in the new format as well. Publishers are to begin keeping their records for the new reporting format on April 1. ☐

Offset, letterpress use analyzed

A new study by the ANPA Newsprint and Transportation Department shows that the 1,548 U.S. daily newspapers printed by the offset process consumed 5,149,691 metric tons of newsprint in 1986. The letterpress and DiLitho® dailies, although numbering only 234, used 3,715,436 tons that year.

Thirty-one newspapers used both offset and letterpress presses in 1986 (the last year for which detailed consumption figures are available), and their newsprint consumption was apportioned between the two categories.

The study, the first of its kind by ANPA, is a spinoff of the Association's annual state-by-state consumption report [**presstime**, July 1987, p. 76]. The study included 1,751 general-circulation daily newspapers as well as some foreign-language, college and special-service daily newspapers such as trade publications. ☐

Session topics announced for newsprint seminar

Program details are being developed for the Newsprint and the Pressroom-III Seminar Oct. 13-14 at the Chicago Hilton and Towers.

Sponsored by the Joint Standing Committee of ANPA and the Canadian Pulp and Paper Association's Technical Section, the program will consist of three half-day sessions: Newspapers—Where We Are Today; Newsprint—Where We Are Today; and 1990 and Beyond—Newsprint and Newspapers.

The fee, which covers all sessions, two continental breakfasts and one luncheon, is $275 U.S. and $375 Canadian.

For information in the United States, contact the ANPA Newsprint and Transportation Department at The Newspaper Center, Reston, Va.; (703) 648-1101, FAX (703) 620-4557. In Canada, contact R.A. Joss of CPPA, Sun Life Building, 19th floor, 1155 Metcalfe St., Montreal, Canada H3B 4T6; (514) 866-6621, FAX (514) 866-3035, Telex 055-60690. ☐

NEWSPRINT NOTES

- The Alberta government said Alberta Newsprint Co. will build a $360-million, 220,000-metric-tons-a-day newsprint mill near Whitecourt. The mill, scheduled to be completed by 1990, will be the first **newsprint facility in Alberta**.

The newly formed company is jointly owned by a group of western Canadian companies. The Alberta government will guarantee as much as $200 million of loans for the mill and provide $8.3 million for road and rail improvements in the area. The mill already has contracts for 147,000 tons annually [**presstime**, Jan. 1988, p. 61].

- Daishowa America Co. Ltd. announced a **feasibility study** for the addition of two new paper machines at its Port Angeles, Wash., mill. The expansion could cost $560 million and include a 200,000-metric-tons-a-year newsprint machine and a telephone-directory-paper machine. The company, a subsidiary of Daishowa Paper Manufacturing Co. Ltd. of Japan, said that up to half of the new newsprint machine's production could be sent to Japan, but that the mill's primary marketing focus will continue to be North America.

- Catawba Newsprint Co.'s **rebuilding of a newsprint machine** at its Catawba, S.C., mill is expected to increase annual newsprint capacity there by 9,000 metric tons, effective in the second half of 1988.

- Donohue Inc. plans to build a $30-million **de-inking facility** at its Clermont, Quebec, newsprint mill. The company will be the first in Quebec to recycle waste paper on a large scale.

- James Maclaren Industries Inc., which is building a new pulp mill at Masson, Quebec, expects this increased pulp capacity to enable the company to **add 30,000 metric tons of newsprint capacity** by the end of 1988.

- Cascades Niagara Falls Inc. is considering the use of a paper machine refurbished at its Niagara Falls, N.Y., mill to **produce newsprint rather than corrugated paper** as previously planned. The machine will have a capacity of 29,500 metric tons a year [**presstime**, Feb. 1988, p. 65].

- Boise Cascade Canada Ltd. will spend $31 million to **rebuild a newsprint machine** at its Kenora, Ontario, mill. The project is scheduled for completion in the first or second quarter of 1989. Capacity will stay the same but the renovation will result in higher-quality newsprint.

3-year labor pact still prevails

The three-year labor contract continues to be the standard in the U.S. pulp and paper industry.

More than three-fourths of the contracts negotiated in 1987 were for that duration, the American Paper Institute reports. Of the 71 agreements, 54 were for three years, 10 were for two years, five for four years, one for one year, and one for five years.

First-year wage increases amounted to a weighted, national average of 0.4 percent. Deferred increases [**presstime**, April 1987, p. 71] averaged 1.5 percent for the second year and 1.6 percent for the third.

The following charts summarize the wage provisions for 1987 contracts:

1987 first-year wage increases[1]

Region	Mills[2]	Employees[2]	Weighted average[1]
New England	12	5,004	0.3% (4¢)
Eastern	15	4,776	1.3% (16¢)
Midwest	21	7,094	0.6% (6¢)
Southern	7	3,946	0.1% (0¢)
Pacific	16	7,031	0.0% (0¢)
National totals 1987	71	27,851	0.4% (5¢)
National totals 1986	129	61,028	0.3% (3¢)

Deferred wage increases (negotiated in 1987)[1]

Second year (1988)

Region	Mills[2]	Employees[2]	Weighted average[2]
New England	12	5,004	1.8% (19¢)
Eastern	15	4,776	2.1% (25¢)
Midwest	20	6,939	2.2% (27¢)
Southern	7	3,946	1.5% (20¢)
Pacific	16	7,031	0.0% (0¢)
National total	70	27,696	1.5% (17¢)

Third year (1989)[1]

Region	Mills[2]	Employees[2]	Weighted average[2]
New England	11	4,924	1.7% (20¢)
Eastern	9	3,490	2.4% (30¢)
Midwest	19	6,629	2.4% (29¢)
Southern	6	3,065	2.0% (27¢)
Pacific	15	7,031	0.3% (4¢)
National total	60	25,139	1.6% (20¢)

[1] Excluding lump sum bonuses and special adjustments not granted to all employees

[2] Preliminary

Contract ratified

Members of the Association of Western Pulp & Paper Workers in February ratified a three-year contract at Boise Cascade Corp.'s Steilacoom, Wash., newsprint mill.

Workers will receive $1,100 in the first year and a 2-percent bonus based on annual pay in each of the second and third years [**presstime**, March 1988, p. 61]. ☐

Consumption growth continues unabated into 1988

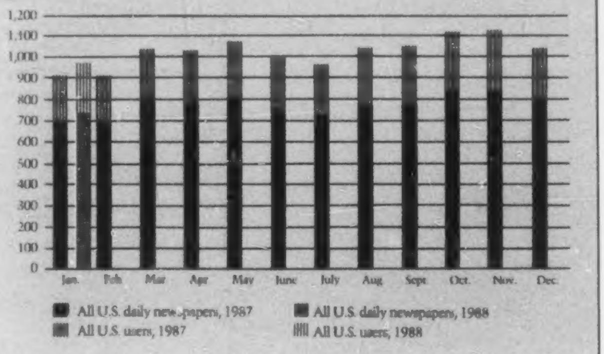
Newsprint consumption began 1988 the same way it ended 1987—with continued growth.

All U.S. users consumed 7.5-percent more newsprint in January compared with January 1987, and U.S. daily newspapers used 6.4-percent more. There was an extra Sunday in January this year, which would account for about 3 percent of the increase.

Newsprint inventories of newspapers in ANPA's statistical sample averaged a total of 45 days, compared with a 41-day supply a year earlier.

Canadian production increased 3.5 percent from January 1987, while U.S. production rose 1.7 percent. Worldwide shipments from Canadian mills were down 4.5 percent, and those from U.S. mills increased 2.4 percent.

The Canadian operating rate in January was 99 percent, and in the United States it was 93.6 percent.



Estimated newsprint consumption, 1987-1988 (thousands of metric tons)

Estimated consumption of all U.S. daily newspapers[1]

Region	December 1987(r)	December 1986	% Change
Northeast	191,747	184,547	+ 3.9
North Central	165,691	162,194	+ 2.2
South	251,448	243,691	+ 3.2
West	185,413	172,420	+ 7.5
Circulation Size			
up to 25,000	64,903	57,058	+ 13.7
25,001-100,000	170,939	158,268	+ 8.0
Over 100,000	558,457	547,526	+ 2.0
December totals	794,299	762,852	+ 4.1
Twelve-month totals	9,303,332	8,865,127	+ 4.9
Region	**January 1988(p)**	**January 1987**	**% Change**
Northeast	184,131	172,993	+ 6.4
North Central	154,111	145,565	+ 5.9
South	233,707	218,521	+ 6.9
West	171,938	161,945	+ 6.2
Circulation Size			
up to 25,000	58,119	48,628	+ 19.5
25,001-100,000	156,736	148,155	+ 5.8
Over 100,000	529,032	502,241	+ 5.3
January totals	743,887	699,024	+ 6.4

Estimated consumption of all U.S. users

	1987	1986	% Change
November totals	1,134,375(r)	1,077,878	+ 5.2(r)
December totals	1,044,770(r)	1,010,186	+ 3.4(r)
Twelve-month totals	12,317,743(r)	11,936,693	+ 3.2(p)
	1988	**1987**	**% Change**
January totals	975,810(p)	907,767	+ 7.5(p)

Production

	Canada	U.S.A.	North America
January 1988	821,781	452,287	1,274,068
January 1987	794,074	444,790	1,238,864
Increase	+ 27,707	+ 7,497	+ 35,204
	+ 3.5%	+ 1.7%	+ 2.8%

Stocks

U.S. publishers[2]	Tonnage	Days' supply on hand	Days' supply in transit
November 1987	866,190	35(r)	7
November 1986	803,048	33	7
December 1987	900,315(r)	38(r)	8
December 1986	848,602	37	8
January 1988	911,884(p)	37(p)	8(p)
January 1987	845,226	35	6
Canadian mills			
January 1988	295,367	—	—
January 1987	321,823	—	—
U.S. mills			
January 1988	51,223	—	—
January 1987	66,773	—	—

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
January 1988	548,355	92,149	75,005	715,509
January 1987	553,115	85,272	111,068	749,455
Increase or	-4,760	+ 6,877	-36,063	-33,946
decrease	-0.9%	+ 8.1%	-32.5%	-4.5%
From U.S. mills				
January 1988	412,743		24,452	437,195
January 1987	397,562		29,529	427,091
Increase or	+ 15,181		-5,077	+ 10,104
decrease	+ 3.8%		-17.2%	+ 2.4%
From North American mills				
January 1988	961,098	92,149	99,457	1,152,704
January 1987	950,677	85,272	140,597	1,176,546
Increase or	+ 10,421	+ 6,877	-41,140	-23,842
decrease	+ 1.1%	+ 8.1%	-29.3%	-2.0%

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[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

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Collectively and Sing

May 1988

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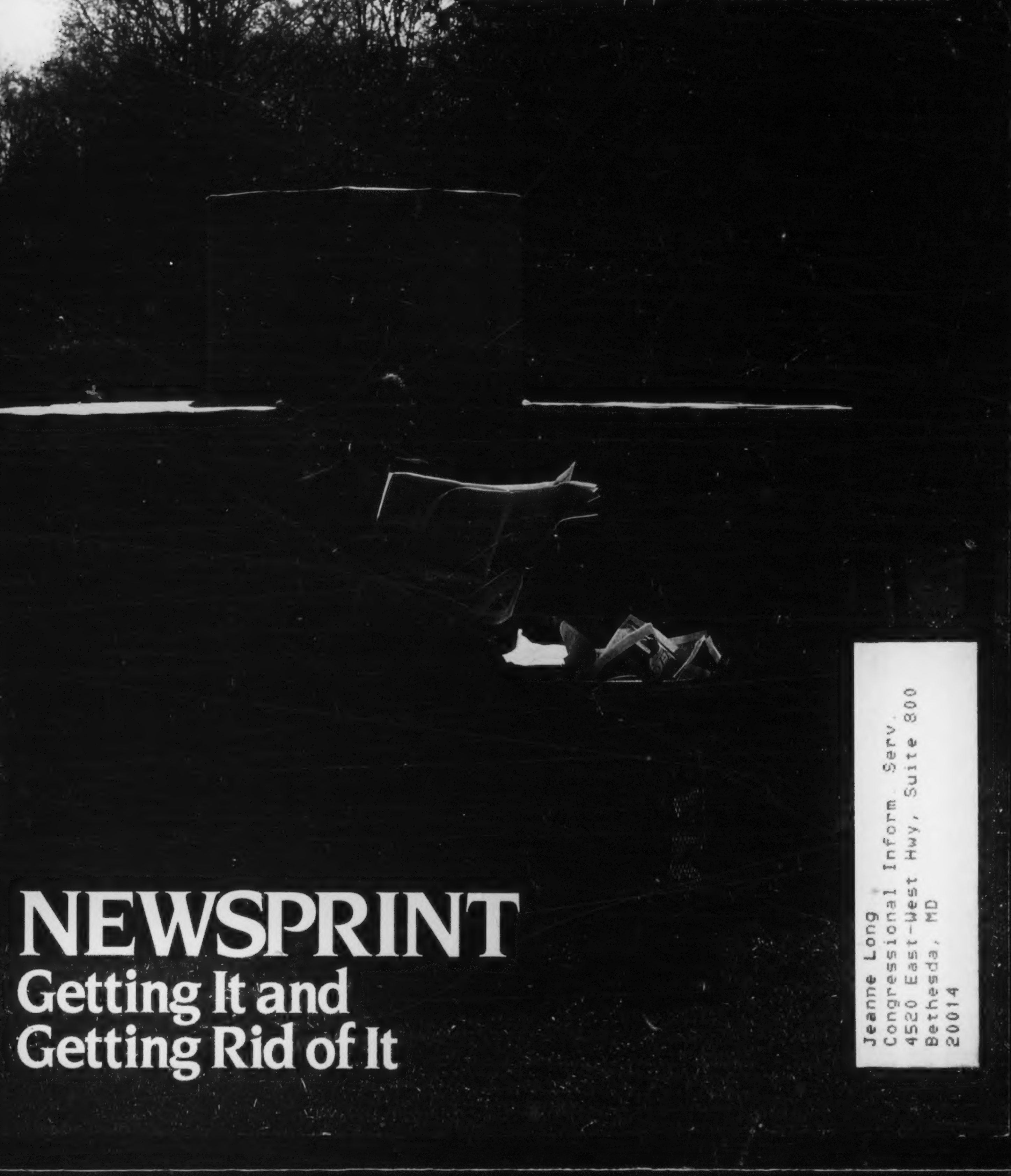
The Journal of the American Newspaper Publishers Association



NEWSPRINT

Getting It and Getting Rid of It

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presstime

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Special Report *Paper procurement has always had a high priority with publishers, and for good cause. An essential ingredient in publishing, newsprint also is a major expense item. Newspapers are concerned about its price, its supply and its quality. Increasingly, however, they are pondering another aspect of the paper chase—its disposal. As landfills close, local and state governments are searching for ways to reduce the solid-waste stream. Many are taking a new look at recycling with an eye toward improving recycling rates for newspapers and other major components in solid waste.* **33**

Top execs: Who they are *Newspaper publishers have some common traits. They are a youthful lot, have similar backgrounds and are happy in their work.* **6**

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CHAIRMAN'S CORNER

Turning tables: We would hire more white males, but . . .

Our experience hiring white males has not been altogether good. As soon as we get one trained, he is off to a bigger newspaper for more money. It sometimes seems all we do is train people for the big and diverse urban dailies.

Most of the young ones we hire do not have good language skills, they have to be taught their jobs, and their education is not what it should be.

White males are cliquish. They tend to talk to each other about their own interests, things like football spreads and line scores, and other people feel excluded. They sit together in the lunchroom, making others feel unwelcome.

Furthermore, as soon as they get married they are apt to move somewhere else with their spouses. Or, they have children and start worrying about nursery schools and doctors' appointments. They become less interested in working the long hours newspaper work sometimes requires.

However, there is something to be said for hiring them. If we hire just Hispanics/women/blacks/Asians/native Americans, the newspaper will be a less interesting place to work. We will deprive ourselves and our readers of white males' unique cultural perspectives and their understanding of the white male world.

George W. Wilson

It is hard to locate and retain good newspaper people. Can any of us afford to so restrict our hiring practices that we routinely pass over or find excuses not to hire white males? It is well-documented by now that white males can learn the demanding profession we practice, that they can perform to the highest expectations and that they are willing to make career commitments. Many who have been taught and nurtured and promoted have committed themselves to the welfare of their newspapers. They seem to want a lot of pay and encouragement, but perhaps that is the price we must pay for a balanced and loyal workforce.

It will be difficult for us to remain a mass medium if we do not reach out to all elements of our society. Penetration levels of newspapers could be better. Can we afford to turn our backs on any segment of our communities?

Remember, too, our communities are not isolated as they once were. Television and mobility have changed our nation and all but wiped out yesterday's parochialism. We will want to hire and promote white males even if we must hire them from other communities. Our newspapers report on a larger nation, with a great diversity of national issues. Our readers are attuned to that larger world. Can we afford to be less reflective of that world?

Many newspapers, and countless other businesses, have seen white males advance successfully into the highest levels of management. They have shown the ability to overcome their narrow cultural biases and embrace cultural variety.

Indeed, many have so expanded their vision and understanding that, as executives, they hire and encourage those who are not themselves white males. It is an encouraging sign.

George Wilson

George W. Wilson
ANPA Chairman

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Newsprint

Publishers face the possibility of paying for it twice: to buy it from the papermakers and to dispose of it in accordance with the regulators

BY MARGARET G. CARTER
presstime staff writer

Richard K. Wager of the Poughkeepsie (N.Y.) Journal has been giving paper a lot of thought lately. Not the paper. *Paper*. The 5,400 metric tons of newsprint his newspaper uses each year.

First and foremost, he is trying to cope with soaring newsprint prices. The Poughkeepsie publisher has seen his newsprint costs rise from $2,664,444 in 1985, when the list price was $535 per ton, to $3,404,322 last year, when the price reached $610 a ton. There was yet another price increase earlier this year—to $650 a ton—and the mills seem inclined to try for perhaps $680 a ton by the end of this year.

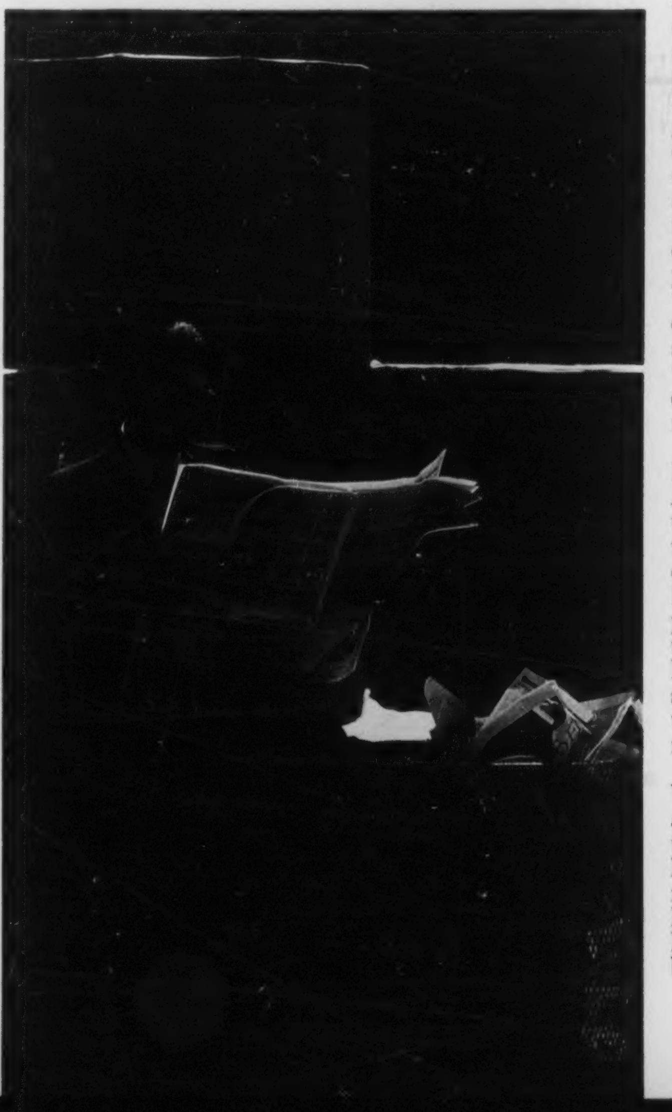
Already, Wager says, when a customer plunks down 35 cents to buy the weekday Journal, the newsprint in the copy pulled out of the rack costs the newspaper company about 20 cents. The 42,821-circulation Journal is rather typical of U.S. daily newspapers in that newsprint is its second-biggest cost item, next to payroll.

So, like his counterparts around the country, Wager is now scratching his head, trying to figure out ways to hold newsprint bills to a minimum. One thing he is considering is a reduction in the width of the paper that runs through the Journal's presses; shaving off a quarter-inch off each web would result in an annual saving of between $16,000 and $17,000.

"One of the things that bothers me about newsprint is the inevitability, it seems, of price increases," he says. "Where is that going?"

At the same time he is trying to swallow higher prices, Wager is trying to deal with a new paper challenge: disposing of waste newspapers. "It's clear that waste disposal is a giant issue in New York state," he says. "We just don't know what to do with it (waste)."

The state's Business Council has identified solid-waste management as one of the most important public policy issues that will be addressed over the next few years.



State regulators are considering imposing fees on companies, proportionate to the amount of solid waste they generate. And a legislative commission has begun to question newspapers about their use of newsprint. The commission has noted that paper and paperboard are "one of the largest components of the state's solid waste stream" and that "a substantial part . . . can be attributed to newspapers."

As president of the New York Publishers Association, Wager and the organization are tracking these developments closely. Publishers share politicians' desire to solve the solid-waste problem, he says. "But we don't want something that will end up to be a disaster for newspapers."

In a nutshell, then, Wager and other publishers are looking at a supreme irony: having to pay ever-higher prices to buy newsprint, and then possibly having to pay still more to have it buried, burned or born again in a recycling mill.

NEWSPRINT: PART I

How We Get It

Higher production capacity will help stabilize prices, and quality continues to improve

Lower prices, higher quality and a sure supply sum up publishers' wish lists when it comes to paper procurement. Prospects look good for getting two out of three, but forget about lower and, for a while at least, even stable prices.

The bad news for publishers is that analysts expect newsprint prices will continue to climb for the next year or so.

The good news is that increased production capacity is on the way, which should help meet growing demand and bring price stability in the early 1990s.

Quality is on the rise, too, as producers modernize their papermaking machines and formulate new pulp mixtures.

But if publishers could tell producers to do just one thing, it would be to "hold that price," says ANPA Newsprint Committee Chairman James R. Moroney Jr., publisher of The Dallas Morning News.

Reflecting some of the cost-cutting measures newspapers are implementing to cope with rising prices, the Morning News has reduced the width of its pages an eighth of an inch and moved to a lighter-than-standard weight paper for its classified-advertising section.

In addition to price stability, publishers are calling for higher quality paper, consistent with the industry's campaign to improve the look of the printed product.

Newspapers are "looking at quality a lot more stringently than they used to," says Doris E. Kleintop, ANPA technical supervisor/newsprint quality. Kleintop traces the beginning of the big quality quest to the start-up of USA Today, which set rigid specifications for its newsprint. To achieve the same high-quality print job as the Gannett Co. national newspaper, publishers began demanding USA Today-quality paper. "The suppliers have really been on the hot seat ever since," she says.

And, of course, newspapers are perpetually concerned about supply. Robert E. Pifer, publisher of the Sandusky (Ohio) Register (evening, 26,539), remembers a time in the mid-1970s when the newspaper for which he was then working, the Grand Haven (Mich.) Tribune, was down to its last two or three rolls of newsprint. "Once you've lived through one or two of those," Pifer says, "you begin to realize it's very important to have a constant source of supply."

In addition to announced construction projects that will add more than 2-million metric tons to U.S. and Canadian annual newsprint capacity by 1992, progress is being made in the search for alternatives to wood fiber in the manufacture of newsprint. A mill that would use kenaf, a fast-growing annual plant, as a fiber source is being planned in Texas. Also, recycling facilities will be installed in Quebec and Ontario—the second and third newsprint facilities in heavily forested Canada to use waste newspapers for fiber.

There even is some talk in newspaper circles of trying to promote revolutionary changes in the papermaking process.

PRICE, A PERENNIAL PROBLEM. Publisher concerns about the cost of newsprint are nothing new. Seventy-five years ago, ANPA went to Congress to plead, successfully as it turned out, for removal of an import tariff on newsprint to assure an adequate supply of affordable newsprint. ANPA continues to battle to preserve newsprint's duty-free status. (See story, p. 56.)

One reason for high-level concern comes down to the bottom line. Newsprint is a major expense for newspapers, especially those of at least 50,000 circulation. According to the Newsprint Information Committee, which conducts public relations on behalf of seven Canadian newsprint companies, in 1986 newsprint typically accounted for 22.7 percent of publishing costs at a newspaper of a million or more daily circulation. For a 250,000-circulation daily, newsprint was an even greater expense item—25.2 percent. Newsprint's share dropped to 21 percent for a 50,000-circulation daily and to 13.4 percent for one of 9,000 circulation.

Until late 1986, list prices for newsprint had not risen for more than two years. Then, in eight months, most producers raised prices twice—from $570 to $610 a metric ton in April 1987 and to $650 in January of this year. (A metric ton equals 1.1023 short tons.)

Among factors influencing pricing policy has been the Canadian dollar. After hitting a record low in

Poughkeepsie Journal's Wager is worried about newsprint's cost now and in the future.

1985 of 69.25 cents per $1 U.S., the Canadian dollar has risen steadily and cracked what has been called the 80-cent barrier in March. U.S. customers use U.S. dollars to buy Canadian newsprint—last year 56.9 percent of all newsprint consumed in the United States came from Canada—so a weaker U.S. dollar means less profit for the Canadian papermakers.

"I think we have not seen the last of the price increases," says Ross Hay-Roe, author of a newsletter on the forest-products industry. Reflecting a consensus among newsprint analysts, Hay-Roe predicts prices will rise anew in the fourth quarter of this year.

"What happens after that will depend very much on what happens to consumption," he says. "I'm inclined to think we are going to have a recession in 1989, so consumption will weaken and the supply will prove to be adequate."

Another analyst sees two more price hikes in the offing. Brian Topp of Capital Group Securities Inc. of Toronto predicts prices will go to $680 a ton in October and to $720 next April 1. "My view, at this point, is that is likely to be the peak price" for the current cycle of price increases.

THE SUPPLY SIDE. There is another reason analysts are predicting prices will moderate—and perhaps even drop: growing supply. John H. Carroll, vice president of the Montreal stock brokerage firm Andras Research Capital Inc., says newsprint manufacturers "are pretty close to the point where somewhere in 1990 to 1991 there is going to be too much newsprint supply around on a worldwide basis and the price will fall."

With a new mill costing at least $300 million and a single machine $200 million, producers are more apt to invest in increased capacity at the top of the business cycle, when newsprint prices and consumption are high. Currently, the record price is coupled with record usage. In 1987, U.S. consumption, for the fifth straight year, hit an all-time high—12,324,642 tons. U.S. dailies account for 74 percent of that.

Although over that five-year stretch U.S. consumption soared 21.9 percent, very little new production capacity was added. Supplies are expected to be relatively tight for the remainder of this year. But producers are now on the expansion binge that is expected to add 2.1-million tons of U.S. and Canadian newsprint capacity in less than four years. Next year will see the biggest gains, when more than a million tons of capacity will be added. Among the projects that are scheduled to come to fruition are two new mills, one of which has five newspaper companies as partners. (See story, p. 36.)

The "swing factor" in the supply equation is the amount of exports to countries outside North America, says Lawrence A. Ross, first vice president of PaineWebber Group Inc. in New York City. Overseas exports of Canadian newsprint increased from 1.3-million tons in 1985 to 1.5-million tons last year, largely because the decreased value of the Canadian dollar relative to many foreign currencies made the country's newsprint cheaper for European and Asian customers.

With global demand continuing, Ross estimates that Canadian and U.S. mills will churn out 15,075,000 tons of newsprint this year—96.5 percent of capacity. "It doesn't leave much margin for error," he notes.

Darryl M. Wharton, president of Scripps Howard Supply Co., agrees. "Any strike or work stoppage or problem that disrupts the production cycle could just take this whole thing crashing down," he says. This year's most closely watched labor situation is in British Columbia, which produces about 16 percent of all Canadian newsprint. Contracts between newsprint mills and two unions expire in the province June 30.

Francois Boulay

Donohue Malbaie's state-of-the-art newsprint machine at Clermont, Quebec, features an enclosed operator console.

NEWSPAPER ADJUSTMENTS. Publishers are not spending a lot of time thinking about the prospect that—barring a strike or some other calamity—the newsprint situation should improve in the years ahead. They are too busy trying to figure out how to pay higher newsprint bills in the meantime.

"When the industry incurs two price increases a year, it is very difficult to adjust to," says David F. Licko, controller of the Reno Gazette-Journal and first vice president of the International Newspaper Financial Executives. "It is nearly impossible to pass that all along in either circulation or advertising price increases. Do you eat it on the bottom line, or do you try to make up for it through (cutting out) other expenses? It forces management to make some tough choices."

His newspaper is increasing its Sunday single-copy price from $1 to $1.25. "And we are trying to be very careful with the way we use newsprint," Licko says. "We are trying to edit tightly and we're taking a very close look at returns (of unsold copies), trying to control newsprint waste better than we ever have before." There's nothing "original" about any of those responses, notes Licko—"just the same old tried and true newsprint-saving procedures" but with added emphasis.

The Kansas City Star and Times are among those taking another conservation step—reducing the width of the newsprint rolls that run through the press. "This is one thing that we can do that will probably not even be discernible to the readers, takes very minor press alterations and should be very cost-effective," says W. Kent McCall, director of purchasing.

According to McCall, the 1/4-inch reduction will not change the size of the printed image on a page and thus will not affect adherence to the Standard Advertising Unit system adopted several years ago by most U.S. newspapers. Some industry leaders have cautioned that any moves to reduce the size of the printed page would jeopardize the hard-fought SAU® system.

The Kansas City papers also plan to test some lighter-weight newsprint. "There are some economies involved," McCall says. Like most U.S. newspapers, the Star and Times currently are printed on paper with a "basis weight" calculated as 30 pounds per 500-sheet ream of newsprint measuring 24 by 36 inches.

> *"Any strike or work stoppage or problem that disrupts the production cycle could take this whole thing crashing down."*
>
> **Darryl M. Wharton**
> **Scripps Howard Supply Co.**

The Daily News in New York City had been contemplating a switch to a lighter weight paper even before the recent run-up of prices. "With the price increases, it kind of escalated our evaluation process," says K. Michael Tomasieski, vice president/director of production. Since Jan. 1 the Daily News has used 27-pound newsprint.

To induce newspapers to use the rolls, producers have been offering discounts, Tomasieski says. However, the discounting may end, he says, unless the newsprint companies can verify that the lighter paper is less expensive to manufacture.

Even if the discounts are discontinued, Tomasieski says he does not believe the Daily News will return to 30-pound stock. With the lighter paper, "We are able to print the same number of copies and pages with fewer rolls of paper, so we have less handling. We have fewer pasters to make. We have less waste (and) fewer cores to deal with."

The only thing that would dictate a return to heavier paper, Tomasieski says, would be "quality issues." But so far, the "printability" of the 27-pound paper has been "very acceptable," he says.

THE QUALITY QUEST. The whole matter of quality is a chief concern of newspapers today, and it is beginning to show up in the way they do business with newsprint producers. Until recently, says Homer E. Taylor Jr., vice president/supply for Knight-Ridder Inc., publishers did not insist on having guarantees of quality written into their newsprint contracts. "But they all will have it in the future," he says, adding that Knight-Ridder is taking that step this year.

Taylor also credits USA Today and its newsprint specifications with raising consciousness about the contribution good paper makes to a superior printing job.

ANPA's Kleintop says ANPA will publish USA Today's specifications and those of four other daily newspapers in *ANPA-TEST,* a manual to assist newspapers in checking the quality of their raw materials.

Kleintop says newsprint quality has been improving. One indicator is moisture content. In 1980, newspapers' newsprint samples submitted to ANPA for testing had moisture content of 7.3 percent. Today, it is 8 percent "and still climbing," she says.

Some Newspapers Play a Big Role in Making Newsprint

McClatchy Newspapers is going into the newsprint business.

It and four other newspaper companies will be partners with Great Lakes Forest Products Ltd. in a newsprint mill scheduled to begin operation next year in Usk, Wash.

"We felt that inasmuch as newsprint is such a vital part of newspaper publishing, that we would like to have a participation in one of our sources of newsprint," explains Publisher James McClatchy, a member of the ANPA Newsprint Committee.

All but one of the newspaper companies are new entrants in the papermaking field. They will join 13 others with some equity interest in newsprint manufacturing operations, according to the ANPA Newsprint and Transportation Department. (See chart, p. 41.)

Newspaper ownership of newsprint mills can be traced to 1913, when the Chicago Tribune opened a mill at Thorold, Ontario.

Some newspapers' entry into the business was more a result of circumstance than contrivance. Cowles Publishing Co., which owns The Spokesman-Review and Spokane Chronicle, acquired a major share of Inland Empire Paper Co. in Millwood, Wash., during the Great Depression. "It was primarily a case of a major supplier, a local supplier, threatened financially, and we were in a position to guarantee ourselves a supply close to home," says Shaun O'L. Higgins, director of consumer marketing and public relations.

He estimates that "well over 80 percent" of the newspapers' paper needs are met by the mill.

While a secure supply is one big reason newspaper companies invest in newsprint mills, another is protection against rising costs.

"If there is an increase in the cost of the paper, we have no problem because it is our own company that supplies us the paper," says Jean Pagé, corporate controller for Quebecor Inc., the Montreal-based newspaper company that bought a 51-percent interest in a block of shares comprising 55 percent of Canadian newsprint producer Donohue Inc. The newsprint company stands to make higher profits when it raises the price newspapers must pay for paper, says Page, "but it's our profit."

A profit motive is also involved in newspaper companies' investment in mills. "It's a very profitable business for us," says David L. Jordan, vice president/finance for Media General Inc. of Richmond, Va., which owns Garden State Paper Co.

Newspaper analyst John Morton of the brokerage firm Lynch, Jones & Ryan says one of the most beneficial aspects of newspaper ownership of newsprint mills is that if the newsprint market is soft, the newspaper owners can step up their buying to keep mills operating at or near capacity.

Morton says he has not seen any "dramatic increase" in recent years in newspapers' investment in newsprint production. "There has been an ongoing investment in it."

In fact, Morton says the most significant development of late has been The Times Mirror Co.'s decision to get out of the newsprint business.

In 1986, the company sold all but 20 percent of Publishers Paper Co. in Oregon to Jefferson Smurfit Corp. and announced its intention to dispose of its timberlands.

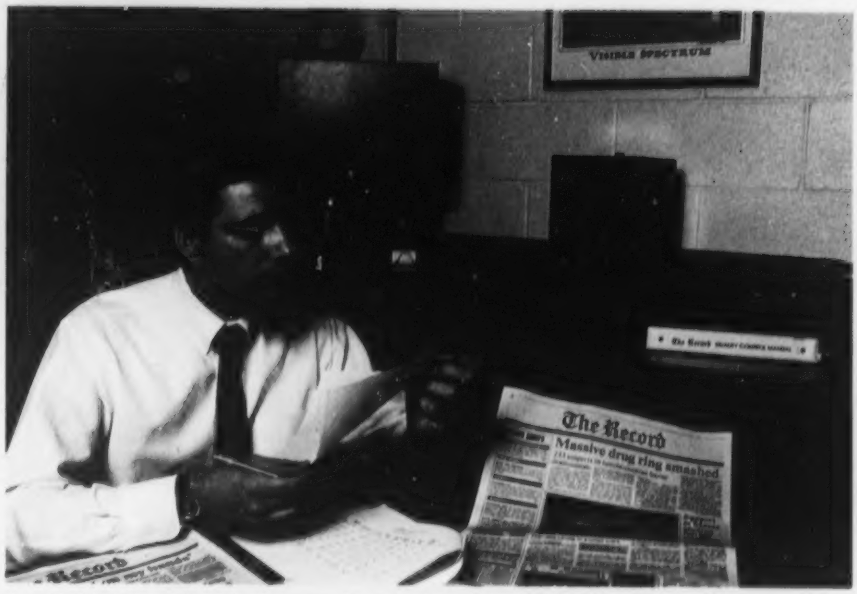
According to Morton, one of the big reasons for the divestment was that the company's forest-products segment had become so large that Times Mirror was being regarded "more as a paper producer than as a media company." The depression in the forest-products industry earlier in this decade "had really harmed" the company's stock price.

ANPA recommends a range of between 7.5 and 8.5 percent to minimize the risk of a web break while the press is running.

Besides ANPA's 30-year-old newsprint-testing program, a few newspaper companies do their own testing. For example, The Record in Hackensack, N.J., evaluates optical properties of brightness, luminosity, opacity, whiteness, yellowness and color saturation. It also looks at surface cleanliness, ink absorption, roll hardness and web-break frequency.

The newspaper issues "report cards" to its eight newsprint suppliers every four weeks, grading them on those specifications. Echoing ANPA's Kleintop, Color Quality Manager Paul T. Lynch says there have been notable improvements in overall quality.

Experts say this enhanced quality results from improvements in papermaking processes and machinery, many of which "have been customer driven," says Roger W. Strauss, who retired in April as director of technology and environmental services at Bowater Inc., the largest newsprint manufacturer in the United States.



Lynch of The Record grades paper quality and informs suppliers of the results.

Traditionally, newsprint was made by running a pulp solution across a moving mesh "forming wire," which allowed most of the water in the solution to drain through the bottom. New "twin-wire" machines have two forming screens, and water drains from both sides. Paper produced on a twin-wire machine has better fiber formation and causes less linting, says Strauss.

A second improvement has been in the use of "cross machine controls," he says. Previously, mill workers checked the uniformity of moisture content across the width of the roll being produced by beating on it with a stick and listening for differences in sound. Now moisture is automatically controlled, as is basis weight and caliper (thickness). In the pulp area, "the most dramatic" development in the last 10 years has been the use of "thermomechanical pulp," or TMP, Strauss says. Produced from chips in a pressurized refining process, TMP has fibers that are longer and therefore stronger than those obtained in the "stone-ground" process, in which logs are rubbed against a grinding stone.

FORMULAS FOR THE FUTURE. The science of papermaking is continuing to evolve. In the 1950s and '60s, a New Jersey publisher, Richard B. Scudder, successfully developed a method of taking the ink out of waste newspapers. This led to the opening of the world's first newsprint mill that uses only waste newspapers as fiber. The notion of turning yesterday's newspapers into tomorrow's newsprint rolls has been making steady if unspectacular inroads ever since.

In the 1970s and early '80s, ANPA (along with the U.S. Department of Agriculture) funded research into the possibility of using the jute-like plant kenaf as a substitute for wood in the manufacture of newsprint. Today, a private firm, Kenaf International, is seeking financing for construction of a kenaf newsprint mill near McAllen, Texas.

Now the newspaper business is beginning to wonder if there might be other developments on the papermaking front it could spur. ANPA President Jerry W. Friedheim says the ANPA Board of Directors, in "close cooperation" with the Canadian Pulp and Paper Association and the American Paper Institute, "is interested in the continuing evolution of current paper-formation technology and in keeping open the window of possibility that someday, from some place, some scientists may find a new generation of papermaking techniques." ANPA, which long has had a Joint Standing Committee with the Technical Section of CPPA, recently established a similar relationship with the API.

Research for the Canadian newsprint industry is carried on by the Pulp and Paper Research Institute of Canada. The institute, near Montreal, is supported by the newsprint industry and the Canadian government and has ties to Montreal's McGill University and other schools.

PPRIC Vice President Peter E. Wrist says he sees no fundamental changes in the papermaking process on the horizon. At the same time, he cites a long list of developments to watch for in the next decade, including further advances in twin-wire technology and further development of "forming fabrics and felts" that yield smoother, more consistent printing surfaces.

Wrist says he also expects that the thermomechanical pulp process will be further refined through the addition of chemicals designed to increase strength, improve brightness, allow the newsprint to carry "fillers" that provide a smoother surface, and accommodate inks with low-ruboff characteristics.

Wrist also predicts more use of recycled waste newspapers for fiber at non-urban mills. A clue, he notes, is a new facility being constructed by Donohue Inc. at its mill in Clermont, Quebec. It will use old newspapers, magazines and other forms of waste paper to produce newsprint pulp.

In the United States, the Institute of Paper Chemistry in Appleton, Wis., also is working to modernize papermaking technology. The facility receives funding from U.S. pulp and paper companies and from contracts for research. Vice President Ronald A. Yeske also foresees no dramatic development in the basic way paper is made, although he says one possibility being examined that could signficantly change the process is "impulse drying," whereby the newsprint sheet is dried by a roller so hot that excess water is "blown" out of the paper. This process has potential for "enormous" energy savings, he says.

In addition, Yeske says, impulse drying strengthens the paper and thus could be used to remedy an acknowledged "drawback" of recycled newsprint: fibers that are weaker than those from virgin timber. Such an improvement could mean that greater quantities of newsprint will be recycled instead of being deposited in bulging landfills.

NEWSPRINT: PART II

How We Dispose Of It

Governments look increasingly to newspapers to help solve the mounting waste-disposal crisis

In March, two representatives of the King County Council paid a visit to H. Mason Sizemore, president and chief operating officer of The Seattle Times. "(They) said we ought to be in the recycled newsprint business," Sizemore recalls. To force newspapers to double as recyclers would be "unreasonable," he told the government officials. "We had to explain to them we weren't in the newsprint manufacturing business, but we were willing to cooperate in any way we could to encourage readers to recycle newsprint."

A month earlier, the public works commissioner in Quincy, Mass., proposed placing a 5-cent deposit on newspapers sold in the city so that they would be returned to the plant that produced them.

"Impractical," responded the local newspapers. For one thing, they said, who would determine how much of an edition must be returned to qualify for a refund of the deposit? Paul D. Delorey, circulation director of Quincy's daily paper, The Patriot Ledger, says his reaction to the plan was, "Fine. Then it would become our waste. But you wouldn't have done anything to solve the problem"—*disposal*.

The incidents illustrate two things: first, that governments at all levels are trying to come up with new solutions to the waste-disposal quandary; and second, that newspapers are being looked at to help provide the solutions because paper in general and newspapers in particular are viewed as a part of the problem.

Pressures are sure to grow on newspapers as waste woes worsen. Indicative of the increased involvement of states in the matter, the New York Legislature is looking at a range of proposals, from an investment tax credit for companies—including newspapers—that produce or purchase recycled materials to prohibiting incineration of newspapers. In California, at least 30 pieces of legislation are pending dealing with solid waste issues. Three states already have laws requiring recycling of certain materials, including newspapers, and more are on the way.

The problem is easily understood. Landfills are reaching capacity and closing at a rapid rate in the United States.

And in the list of alternatives to dumping refuse in landfills, recycling rises to the top of the heap. Today, about a third of all copies of U.S. newspapers are recycled, according to the American Paper Institute.

To achieve higher recycling rates, local and state governments are setting recycling goals and requiring households to separate recyclable materials out of their trash.

Yet there are troubling questions associated with such programs. One of the big ones having to do with paper recycling is whether there will be adequate markets for the waste paper collected.

John H. Veidt, vice president and general manager of the Reclamation Division of Jefferson Smurfit Corp., sees a positive scenario: As the volume of collected waste newspapers rises, the price they bring drops, and this will encourage more newsprint mills to install the equipment necessary to use recycled newspapers. Jefferson Smurfit produces newsprint made from 50-percent recycled fiber and 50-percent virgin wood fiber.

But the president of the only company in North America making newsprint out of 100-percent recycled fiber is skeptical about pat answers to the waste-disposal dilemma. Says Basil Snider of Garden State Paper Co., "You cannot recycle your way out of the solid-waste problem."

WASTE WOES. With its landfills full, Seattle has begun dumping its trash in its county's landfills, and both jurisdictions are investigating future disposal options. In Massachusetts, Quincy's sole landfill has been closed by court order.

These areas are emblematic of what's happening in numerous places.

"At a minimum, many parts of the country are today facing very serious times in managing municipal solid waste," J. Winston Porter, assistant administrator of the U.S. Environmental Protection Agency, told a conference on solid-waste management earlier this year. "The word 'crisis' is probably not too strong for at least some high population density areas," he said.

Currently, municipal solid waste—residential, commercial and industrial waste—is disposed of in three ways. About 90 percent is dumped in about 6,000 landfills. About 5 percent is incinerated in 100 incinerators. And about 5 to 10 percent is recycled.

However, Porter said, within the next five to seven years nearly one-third of existing municipal landfills will be full. Furthermore, it is proving hard to find locations for incinerators.

Porter, who is in charge of the EPA's Office of Solid Waste and Emergency Response, said a "reasonable" national goal would be to reduce the solid-waste stream by 25 percent within the next four years by recycling and by "source reduction"—reducing the amount of waste generated through such means as redesigning packages.

He warned that the paper industry, along with metal, plastic, glass, packaging and other industries, "will need to increase significantly their attention to recycling and source reduction activities."

In an interview with **presstime**, Porter urged newspapers to step up promotion of recycling. And although the EPA official stopped short of advocating "less fat newspapers or anything like that," he suggested newspapers begin looking at ways of making

Workmen store old newspapers for recycling at Garden State Paper's Pomona, Calif., mill.

newspaper more "recyclable."

Newspapers made up an estimated 6.7 percent of municipal solid waste in 1984, the most recent year for which EPA data are available. That share is expected to rise to 7.2 percent by the year 2000. However, *all* forms of paper comprise the biggest disposal component—an estimated 37.1 percent in '84 and a predicted 41 percent by 2000, the EPA says.

In recognition of paper's role in the disposal problem, the American Paper Institute last fall formed a Solid Waste Task Force, headed by the chief executive officers of six paper companies. "The purpose of the task force is to draw on all of the basic resources within the pulp and paper and paperboard industry in order to gain a better understanding of the solid-waste issue and to analyze its impact on our industry," explains API President Red Cavaney.

ANPA also is devoting increasing attention to the problem. Following discussions about waste management at the Association's Government Affairs Committee March meeting, staff members are drafting policy positions for committees and the Board of Directors to consider later this year.

The problem, however, does not lend itself to quick solutions. A time bomb for years, it exploded onto newspaper front pages, magazine covers and the nightly TV news only last year when an ocean-going barge traveled 6,000 miles in a futile search for a final resting place for 3,186 tons of garbage from Islip, N.Y.

As an example of the media blitz that ensued, the Long Island newspaper Newsday published a 10-part, 55,000-word series on waste disposal, focusing on the problems associated with burning waste as an alternative to landfill disposal.

Newsday publicly acknowledged its contribution to the solid-waste stream. It calculated that the paper for part one of the series weighed 27 tons; that the rest of the series ran on paper weighing 66 tons; and that a reprint used an additional 5.6 tons.

On a more positive note, Newsday pointed out that some of its copies are recycled, that all pressroom paper waste and extra copies are sold to a recycler, and that about 8 percent of its pages are printed on recycled paper.

GOVERNMENTS GEAR UP. Today, local governments "are looking at a variety of disposal methods to solve their waste-disposal crisis," reports David W. Gatton, director of policy analysis of the National Resource Recovery Association, an affiliate of the U.S. Conference of Mayors. "We've seen a pronounced trend in the last three to four years for an integrated approach to solid-waste management." That means, he explains, some sort of source separation and recycling activity, incineration where there is the need for a reduction of a significant volume of waste, and, finally, some landfill dumping.

"I think you are beginning to see states and local governments pass legislation that would take recycling more seriously than it has been taken in the past," Gatton says.

Three states—Rhode Island, New Jersey and Connecticut—have enacted mandatory recycling laws, and similar legislation in Maryland is awaiting the governor's signature. None of these measures call for specific actions by newspapers or in any way limit newspapers' activities. The same is thought to be the case for similar bills in more than a dozen other states.

However, some government officials see newspapers as key participants in the matter and would like to persuade them to play an active role. In Rhode Island, for example, the nation's first-in-the-nation law was approved two years ago with the goal of recycling a minimum of 15 percent of the state's solid waste. Although there are no special requirements on newspapers, the state wants publishers to "limit" the glossy advertising inserts they carry, according to Victor A. Bell, chief of the Office of Environmental Coordination. Mixing glossy stock with newsprint reduces the value of the waste paper, Bell explains. He says his office will be working with several newspapers on the situation.

On the federal level, the Environmental Protection Agency is revisiting the problem of solid-waste management. In the late 1970s, the agency developed guidelines for choosing landfill sites, but in the early part of this decade turned its focus almost exclusively to hazardous wastes.

EPA's re-entry into the solid-waste field was dictated by congressional action in 1984. Amendments to the Resource Conservation and Recovery Act directed the agency to prepare a status report on how the nation's solid waste was being managed. EPA spokeswoman Robin B. Woods says the report may be available this summer. Congress also called on EPA to expand its landfill guidelines and to issue them as regulations enforcable by states. That, too, should happen this summer, Woods says.

Among other activities, EPA recently established a Solid Waste Task Force of federal and state officials to look at "appropriate state and federal roles in waste management." The agency also issued guidelines to promote use of recycled paper by federal government entities and by some recipients of federal funds.

Meanwhile, Congress is examining solid waste issues as RCRA comes up for reauthorization this year. Among the proposals currently being floated is a tax on materials such as paper, glass and aluminum. The tax would be scaled back as recycling increased.

This much is certain: there is room for improvement in the U.S. rate of recycling.

And that goes for waste newspapers also, even though they are among the largest categories of material recycled.

NEWSPAPE
RETURNS MUST
PLACED INSIDE FO
RECYCLING
NO TRASH NO GARBA
THROW
NEWSPRINT
TO FRONT OF
BOX

Skip Dickstein, The Times-Union

The Times-Union in Albany, N.Y., collects 50 tons of waste paper each month.

According to API, 4 million tons of old newspapers were collected last year for a recycling rate of 33 percent.

Yet in Japan, as much as 80 percent of all newspapers are recycled, API reports. Although the waste-disposal challenges in Japan, a nation of 121 million in an area roughly the size of California, are not comparable to those of the United States, it demonstrates the ultimate in recycling.

One of the "various collection schemes" in Japan is for waste-paper dealers to go through the streets trading fresh rolls of toilet paper for old newspapers, says J. Rodney Edwards, an API vice president.

Hyde Sakata, North American representative of the Japan Newspaper Publishers and Editors Association, says paper recycling there is a habit that started 500 years ago. Today, some newspapers are indirectly involved in recycling efforts because their independent distributors also function as waste-paper dealers. One of Japan's largest newspapers, Asahi Shimbun, gives subscribers plastic bags in which to store their old papers until they are collected.

The United States also has a long tradition of using reclaimed fiber to make the paper on which newspapers are printed. The first newsprint in this country was made out of cotton rags. It wasn't until the late 1800s that wood became the chief ingredient in newsprint. Currently, there are eight newsprint mills in the United States that produce paper from varying percentages of recycled fiber.

RECYCLERS' REACTION. With government-mandated recycling programs becoming more prevalent, the mills that depend on waste newspapers as their source of fiber should be jumping for joy.

That's not entirely the case.

Jefferson Smurfit is of two minds on mandatory recycling. "Yes, we would like lower costs, there's no doubt about it," company executive Veidt says. "And probably over a period of time, if it's done correctly, mandatory recycling would result in an abundance of (collected) newspaper waste, which should eventually then lower the cost." However, Smurfit simultaneously fears that the programs will hurt the charities that use paper drives to raise money.

Snider of Garden State Paper sees an even darker side to mandatory recycling. New Jersey's law, approved a year ago and now being phased in, is "far from being favorable" to operations at the company's recycling mill in Garfield. He explains that a good recycling "infrastructure" already was in place to supply the mill, and that Garden State Paper viewed augmentation of the voluntary system as preferable to installing a mandatory one. "Our concern, frankly, was that if one generates more recyclable materials than there are markets for, then it could collapse that system."

There is some evidence this could happen, Snider says. When West Germany instituted mandatory recycling, a glut of paper was produced, prices declined and the result was "chaos" in the waste-paper market. So far in the United States, Snider notes, prices have not declined, primarily because the market for old newspapers has been very strong. (It is so strong, in fact, that in some cities newspapers left out on curbs for pickup in municipal recycling programs are being taken by scavengers.)

Snider says his company also was concerned that the mandatory program could lead to a growing mixture of slick-paper magazines and plastics with old newspapers. And in this instance, the fears already have been realized. "We are seeing a deterioration of the quality in the paper we're getting. It is having a very noticeable effect on us"—more sorting—and "this begins to effect our economics." Instead of lowering the cost to the company, mandatory recycling could end up increasing costs.

Veidt of Jefferson Smurfit, while believing that ample supply and depressed prices for waste paper may induce more newsprint companies to make recycled paper, cautions that this cannot happen overnight. For a mill to begin using waste newspapers, he notes, it must have special de-inking and pulping equipment.

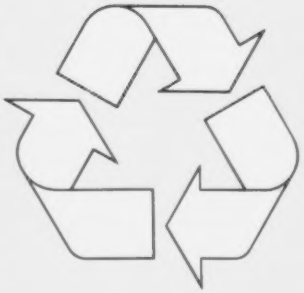
EPA's J. Winston Porter suggested publishers begin looking at ways of making the newspaper more recyclable.

PAPERS PUSH RECYCLING. Some newspapers are not sitting around and waiting for governments to intervene. They are doing their part to facilitate recycling.

The Times-Union in Albany, N.Y., for example, recently placed covered bins in its parking lot for collection of unsold copies. Operations Director Alfred J. Giguere estimates that about 50 tons of waste newspapers are collected each month and turned over to a waste-paper dealer.

The dealer also gets the newspaper's press waste, the paper trimmed from its TV magazine and excess mailroom copies. "Let's face it," says Giguere. "The newspaper is a fairly large producer of landfill material. . . . We feel that we should have all our waste newsprint recycled."

To encourage recycling by readers, The Seattle Times provides free publicity for a charitable group's voluntary recycling drive and also put its name on the side of collection bins.



Other newspapers say they are contributing to the recycling effort by using recycled newsprint. One is the Los Angeles Times, whose owner, The Times Mirror Co., owns 20 percent of two recycled-newsprint mills operated by Jefferson Smurfit in Oregon.

"We surprise a lot of people," says Jon E. Melkerson, the Times' manager of newsprint operations. Of the 470,000 tons of newsprint consumed by the Times each year, 380,000 tons are made from recycled fiber. Of that, 370,000 tons are from Jefferson Smurfit and consist of about half reclaimed fiber; the other 10,000 tons are 100-percent recycled fiber from Garden State's mill in nearby Pomona.

The paper periodically gets challenged from politicians because of its use of massive amounts of newsprint. Says Melkerson: "It's good to be able to say we do support recycling."

These success stories notwithstanding, the American Paper Institute believes newspapers can and should do more. "One thing that has been frustrating to us is that . . . newspapers have not always been enthusiastic about carrying stories telling how much newsprint is recycled in this country," says the institute's Edwards. He pegs this reluctance to the fact that some U.S. newspapers are investors in mills that do not use recycled fibers.

Edwards also says he would like to see newspapers use the API symbol (above) that identifies them as "recyclable" paper products. It would be, he says, "an image-lifting device." □

Newspapers' Ownership Interests in Newsprint Mills

Publisher	**Company and Mill Location**	**Equity Interest**	**Production Capacity (in metric tons)**	**Amount Annually to Publisher**
Cowles Publishing Co., Spokane	Inland Empire Paper Co. Millwood, Wash.	100%	66,400	Not available
Cox Enterprises Inc., Atlanta	Southeast Paper Manufacturing Co.* Dublin, Ga.	33⅓%	190,500	Cox and partners Media General and Knight-Ridder get 35-40% of production
Dow Jones & Co., New York City	Bear Island Paper Co. Ashland, Va.	33%	192,000	16% in 1987; varies from year to year
	F.F. Soucy Inc., Riviere-du-Loup, Quebec	40%	132,000	24% in 1987; varies from year to year
Gannett Co., Arlington, Va.	Donohue Charlevoix Inc., Clermont, Quebec	44.6% of 1 machine	120,000	About 100,000 tons
Knight-Ridder Inc., Miami	Southeast Paper Manufacturing Co.* Dublin, Ga.	33⅓%	190,500	See Cox above
Media General Inc., Richmond, Va.	Garden State Paper Co.* Pomona, Calif.	100%	121,600	5,400 tons
	Garfield, N.J.		197,800	13,600 tons
	Southeast Paper Manufacturing Co.* Dublin, Ga.	33⅓%	190,500	See Cox above
The New York Times Co.	Spruce Falls Power & Paper Co. Ltd., Kapushasing, Ontario	49.5%	343,000	75,000 in 1987
	Donohue Malbaie Inc. Clermont, Quebec	49% of 2 machines	220,000	63,000 in 1987
	Gaspesia Pulp & Paper Co. Ltd. Chandler, Quebec	49%	225,500	180,000 in 1987
Newhouse Newspapers, New York City	Catawba (S.C.) Newsprint Co.	49%	222,000	100%
Quebecor Inc., Montreal	Donohue Inc. Clermont and Amos, Quebec	51% of majority interest	555,000	10,000 tons
Thomson Newspapers Inc., Des Plaines, Ill.	Augusta (Ga.) Newsprint Co.	50%	350,000	Less than 10%
The Times Mirror Co., Los Angeles	Smurfit Newsprint Corp.* Oregon City, Ore., Newberg, Ore.	20%	558,000 combined	About 75%
Tribune Co., Chicago	Quebec and Ontario Paper Co. Thorold, Ontario*, Baie Comeau, Quebec	100%	725,000 combined	About 50%
The Washington Post Co.	Bowater Mersey Paper Co. Ltd. Liverpool, Nova Scotia	49%	218,000	72,500 tons
	Bear Island Paper Co. Ashland, Va.	33⅓%	192,000	49,000 tons

Sources: ANPA Newsprint and Transportation Department, mills and newspaper companies. *Uses recycled pulp.

Consumption, stocks rise in February

Newsprint consumption by all U.S. users increased 5.8 percent in February compared with February 1987. Consumption by U.S. daily newspapers increased 3.6 percent. However, there was an extra day in February this leap year.

Newsprint inventories of newspapers in ANPA's statistical sample averaged a total of 44 days at the end of February compared with 42 days a year earlier.

Canadian production increased 6.5 percent from February 1987, while U.S. production rose 8.6 percent.

Worldwide shipments from Canadian mills were up 3.5 percent. Shipments from U.S. mills increased 8.1 percent, evidently aided by the decreased value of the U.S. dollar.

The Canadian mills' operating rate was 100 percent in February and 99 percent year to date. The operating rate for U.S. mills in February was not available at press time.

Estimated consumption of all U.S. daily newspapers[1]

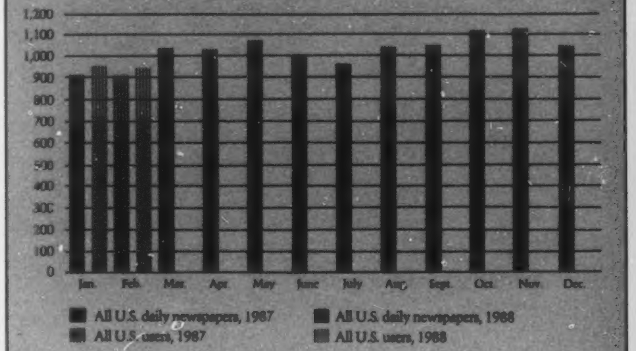
Region	January 1988(r)	January 1987	% Change
Northeast	181,571	172,993	+ 5.0
North Central	151,818	145,565	+ 4.3
South	221,757	218,521	+ 1.5
West	169,608	161,945	+ 4.7
Circulation Size			
up to 25,000	56,706	48,628	+ 16.6
25,001-100,000	150,360	148,155	+ 1.5
Over 100,000	517,688	502,241	+ 3.1
January totals	724,754	699,024	+ 3.7
Region	**February 1988(p)**	**February 1987**	**% Change**
Northeast	181,702	175,712	+ 3.4
North Central	151,262	144,535	+ 4.7
South	223,977	221,917	+ 0.9
West	166,952	156,474	+ 6.7
Circulation Size			
up to 25,000	57,995	53,512	+ 8.4
25,001-100,000	152,974	147,823	+ 3.5
Over 100,000	512,924	497,303	+ 3.1
February totals	723,893	698,638	+ 3.6
Two-month totals	1,448,647	1,397,662	+ 3.6

Estimated consumption of all U.S. users

	1987	1986	% Change
December totals	1,051,669(r)	1,010,186	+ 4.1(r)
Twelve-month totals	12,324,642(r)	11,936,693	+ 3.3(r)
	1988	**1987**	**% Change**
January totals	961,872(r)	907,767	+ 6.0(r)
February totals	958,354(p)	905,647	+ 5.8(p)
Two-month totals	1,920,226(p)	1,813,414	+ 5.9(p)

Production

	Canada	U.S.A.	North America
February 1988	814,596	434,424	1,249,020
February 1987	765,085	400,090	1,165,175
Increase	+ 49,511	+ 34,334	+ 83,845
	+ 6.5%	+ 8.6%	+ 7.2%
Two months 1988	1,636,377	886,711	2,523,088
Two months 1987	1,559,159	844,880	2,404,039
Increase	+ 77,218	+ 41,831	+ 119,049
	+ 5.0%	+ 5.0%	+ 5.0%



Estimated newsprint consumption, 1987-1988 (thousands of metric tons)

Stocks

U.S. publishers[2]	Tonnage	Days' supply on hand	Days' supply in transit
December 1987	900,315	39(r)	8
December 1986	848,602	37	8
January 1988	905,230(r)	37	7(r)
January 1987	845,226	35	6
February 1988	930,170(p)	37(p)	7(p)
February 1987	878,590	35	7
Canadian mills			
February 1988	327,845	—	—
February 1987	331,259	—	—
U.S. mills			
February 1988	50,715	—	—
February 1987	64,604	—	—

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
February 1988	574,693	97,837	109,588	782,118
February 1987	540,667	92,097	122,885	755,649
Two months 1988	1,123,048	189,986	184,593	1,497,627
Two months 1987	1,093,782	177,369	233,953	1,505,104
Increase	+ 29,266	+ 12,617	-49,360	-7,477
decrease	+ 2.7%	+ 7.1%	-21.1%	-0.5%
From U.S. mills				
February 1988	411,872		23,060	434,932
February 1987	380,229		22,030	402,259
Two months 1988	824,615		47,512	872,127
Two months 1987	777,791		51,559	829,350
Increase or	+ 46,824		-4,047	+ 42,777
decrease	+ 6.0%		-7.8%	+ 5.2%
From North American mills				
February 1988	986,565	97,837	132,648	1,217,050
February 1987	920,896	92,097	144,915	1,157,908
Two months 1988	1,947,663	189,986	232,105	2,369,754
Two months 1987	1,871,573	177,369	285,512	2,334,454
Increase or	+ 76,090	+ 12,617	-53,407	+ 35,300
decrease	+ 4.1%	+ 7.1%	-18.7%	+ 1.5%

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[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.

(r) = revised (p) = preliminary

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June 1988

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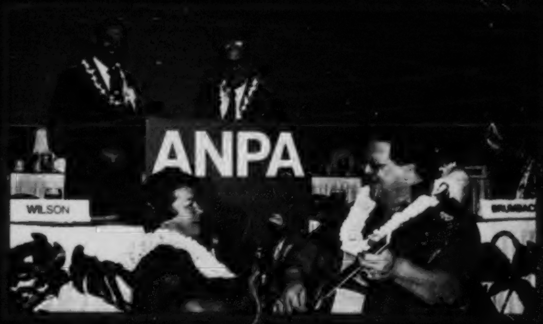
The Journal of the American Newspaper Publishers Association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Convention Report *It wasn't only a convention, it was also an education for newspaper executives attending ANPA's 102nd annual assembly in Honolulu. The 50th state, closer to Tokyo than to Chicago, provided an appropriate setting for a special program focusing on the Pacific region. But the discussions in tropical Hawaii were not limited to global economics and politics; they were balanced by topical sessions of particular importance to the world of newspapering: recruiting minority staffers, building readership and advertising, and finding people to deliver the paper.* **40**

Who wants what? *Syndicates get that question from would-be artists and writers. Then they ask it of editors. The answers are elusive.* **8**

Cleaning up the act *Modern pressrooms are not as messy or noisy as their predecessors, but they still retain some of the old atmosphere.* **16**

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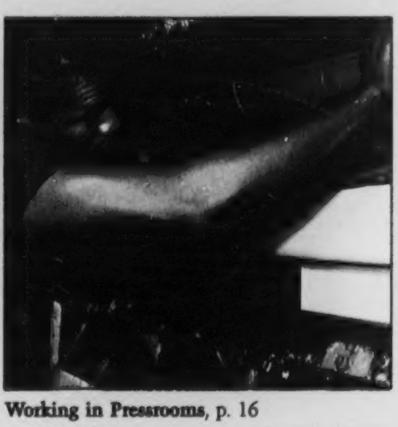

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CHAIRMAN'S CORNER

Continuity and change in the year ahead

When thinking about my first column for **presstime**, two themes came to mind—continuity and change. I believe they represent a fair view of the ANPA for the year ahead.

Continuity has, indeed, been a cornerstone of our Association when it comes to freedom of the press. We have been, and will remain, unwavering in our defense of this constitutionally protected right. We will resist any and all efforts to restrict the free flow of news and our ability to gather and publish it.

We also have continuity in many of our ANPA programs. Many of the challenges facing ANPA are not new to you. For instance, we will continue our efforts at working toward a literate America. We will work with renewed vigor toward sexual and racial diversity in our work force. Indeed, people—how we woo, hire and train them—will be high on our list of ongoing programs.

And there will be continuity in many of our production programs. We will move ahead with paper, ink and printing technologies to ensure that our members can be as close to the cutting edge of technology as they wish to be.

We have continuity in our staff. Under the able leadership of Jerry Friedheim, the dedicated men and women at Reston support us in an articulate, competent and comprehensive manner. They work as a team, and that team is vital to our industry.

Arthur Ochs Sulzberger

Finally, we have continuity in the leadership of your Association. Since the advent of a one-year term for chairman, your Board, under the fine leadership of George Wilson, has worked closer than ever to ensure broad-based decision-making. This is essential as we steer our ANPA ship. The last thing we want with each annual change of leadership is to zig and then zag.

This leads to the second part of my theme, change. Our organization represents a unique industry—an industry that after the end of each day throws out its product and starts all over again. To deal with this living industry we must have a living organization to represent us. And to do that, we must have an organization that is both flexible and willing to change.

There are a number of challenges facing us in the year ahead:

- We will have a new national administration to know, and members of it must be made aware in an expeditious manner of the views of ANPA.
- We will have a new Congress to educate.
- We will face increasing challenges on the ecological front, from bulk-waste problems to those of inks that may be deemed to carry toxic ingredients.

So, flexibility and the ability to respond in a speedy, yet thoughtful, manner must be built into our procedures. This brings me back to George Wilson, who led us through a remarkable year of both continuity and change.

In his first column in this corner a year ago, he wrote:

"ANPA enters its second century with a change to a one-year term for its chairman. After only 12 months, the familiar face of Alvah Chapman, Knight-Ridder chairman, is replaced in this column by that of George Wilson of Concord, N.H. Who?"

Scratch the Who.

Arthur Ochs Sulzberger
ANPA Chairman

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Another billion-dollar spending year planned by U.S. and Canadian newspapers

Newspapers participating in ANPA's annual survey of capital expenditures spent $1.2 billion last year on projects ranging from new buildings and plant expansions to printing presses and vending machines. Thus, the billion-dollar barrier was hurdled for the third straight year.

And the 490 U.S. and Canadian newspaper plants responding to the survey projected expenditures of $1.6 billion for 1988. (See charts below.)

All 1,100 plants that print ANPA-member newspapers were mailed copies of the questionnaire earlier this year, and the response rate exceeded that of 1987, when 434 plants returned forms. The annual fluctuation in response must be taken into account when making year-to-year comparisons, said Peter P. Romano, ANPA director/technical services.

In 1987, the survey participants spent $280.6 million on plant expansion, modernization, land, additions and new facilities, down considerably from $474.5 million in '86. But the newspapers estimated they will spend $540.9 million for these purposes this year.

The 490 plants in the survey projected 1988 expenditures of $1.6 billion.

New equipment purchases were $894.9 million in 1987, up from $660.9 million a year earlier. For this year, new equipment purchases are expected to be just over $1 billion.

In more specific detail, the survey indicated:

- The pressroom remains, by far, the area where newspapers spend the most money. In 1987, $434.2 million was spent on equipment there—nearly twice the 1986 figure, $240 million. The number is projected to climb even higher this year, to $500 million.
- The mailroom is another area of heavy spending. In 1987, $97.4 million was spent to equip mailrooms, the same amount as in '86. A sizable jump, to $115 million, is projected for this year.
- There was a huge increase in spending for personal computers—from $7.3 million in 1986 to $20.4 million last year. Spending for PCs was projected to drop back to $12.2 million this year.
- Front-end computer systems still account for a much larger portion of newspaper budgets than PCs: $100.3 million in 1987 (unchanged from 1986) and a projected $120.6 million this year.
- Equipment expenditures for newsprint handling and newsprint warehouses dropped from $19.3 million in 1986 to $14 million in '87, but they are projected to rise to $32 million this year.
- Expenditures for color-scanner purchases also dropped last year from $12.5 million to $10.5 million. A big jump is projected for 1988, to $20.3 million.
- Money spent on new buildings was down in 1987—$114 million, compared with $186.9 million a year earlier. But a 1988 building boom is expected to cost $308.8 million.

Chart 1—1988 Estimates

Newspaper Plants Participating[1]	U.S. 464	Canada 26	Totals 490
Plant Expansion and Modernization			
New building	$308,637,530	$ 120,000	$308,757,530
Addition to existing building and/or satellite building	72,995,735	280,000	73,275,735
Modernization of existing building	99,890,213	3,937,600	103,827,813
Additional land, parking, garage	54,634,370	422,400	55,056,770
Subtotal	$536,157,848	$4,760,000	$540,917,848
Telecommunications	4,376,851	0	4,376,851
New Equipment			
Computers (hardware and software)			
Front-end systems—editorial, classified, advertising	$ 117,168,421	$ 3,473,700	$120,642,121
Business—accounting, circulation	71,081,995	1,631,640	72,713,635
Personal computers	11,714,895	483,600	12,198,495
Library systems	3,060,359	57,200	3,117,559
Composing room	46,094,725	914,400	47,009,125
Camera—platemaking, editorial photo department	29,144,481	369,476	29,513,957
Color scanners and color separation equipment	19,727,225	602,400	20,329,625
Pressroom	497,570,496	2,095,160	499,665,656
Mailroom	109,280,816	5,623,582	114,904,398
Newsprint handling and warehouse equipment	31,922,593	46,400	31,968,993
Energy, power and security management systems	12,532,371	472,000	13,004,371
New telephone and radio systems	17,986,721	102,488	18,089,209
Transportation—automobiles and trucks	41,229,799	917,656	42,147,455
New furniture and office equipment	32,878,988	710,820	33,589,808
Newspaper vending machines	8,146,332	2,272,022	10,418,354
Commercial or job printing equipment	4,922,954	1,000,000	5,922,954
Waste Ink Reclaiming Equipment	2,127,743	0	2,127,743
Other	10,565,593	352,475	10,918,068
Subtotal	$1,067,156,507	$21,125,024	1,088,281,531
Estimated Total Outlays	$1,607,691,206	$25,885,024	$1,633,576,230

[1] Figures represent only those ANPA-member plants reporting and not all daily newspapers.

Chart 2—1987 Expenditures

Newspaper Plants Participating[1]	U.S. 464	Canada 26	Totals 490
Plant Expansion and Modernization			
New building	$113,403,441	$ 648,800	$114,052,241
Addition to existing building and/or satellite building	50,980,823	156,554	51,137,377
Modernization of existing building	84,246,088	1,076,196	85,322,284
Additional land, parking, garage	29,130,793	1,013,080	30,143,873
Subtotal	$277,761,145	$2,894,630	$280,655,775
Telecommunications	8,406,963	21,600	8,428,563
New Equipment			
Computers (hardware and software)			
Front-end systems—editorial, classified, advertising	$ 97,182,087	$ 3,117,054	$100,299,141
Business—accounting, circulation	44,214,639	4,288,574	48,503,213
Personal computers	11,968,710	8,383,546	20,352,256
Library systems	1,637,680	68,347	1,706,027
Composing room	19,257,690	1,210,298	20,467,988
Camera—platemaking, editorial photo department	13,649,972	400,383	14,050,355
Color scanners and color separation equipment	10,000,291	543,996	10,544,287
Pressroom	431,924,144	2,341,561	434,265,705
Mailroom	93,640,152	3,762,320	97,402,472
Newsprint handling and warehouse equipment	13,471,322	621,647	14,092,969
Energy, power and security management systems	11,222,157	375,900	11,598,057
New telephone and radio systems	21,760,494	532,782	22,293,276
Transportation—automobiles and trucks	38,513,846	1,529,355	40,043,201
New furniture and office equipment	33,055,198	1,005,027	34,060,225
Newspaper vending machines	10,724,913	1,207,433	11,932,346
Commercial or job printing equipment	4,794,535	63,269	4,857,804
Waste Ink Reclaiming Equipment	1,017,083	300,163	1,317,246
Other	6,847,559	278,353	7,125,912
Subtotal	$864,882,472	$30,030,008	894,912,480
Total Outlays	$1,151,050,580	$32,946,238	$1,183,996,818

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- Additions to existing buildings/and or satellite buildings also declined steeply last year when compared with the previous year. In 1987, $51.1 million was spent in this category, compared with $144.3 million in 1986. In 1988, survey participants estimated they would spend $73.2 million to add space to their newspaper buildings.
- The composing room continues to be an expensive place to furnish. In 1986, respondents spent $15.7 million on equipment there, and in 1987, $20.5 million. This year the figure is expected to soar to $47 million.
- Spending for telephone and radio systems went from $13 million in '86 to $22.2 million last year. In 1988, it is projected to be $18 million.
- Other telecommunications expenditures for '87 totaled $8.4 million, up from $6 million in 1986. The estimated figure for 1988 is $4.4 million.
- Purchases of cars and trucks reached $40 million in 1987—about $8 million more than the previous year. For 1988, they are projected to be $42.1 million.

Ink-reclamation equipment was broken out as a separate category for the first time. Respondents reported spending $1.3 million on such equipment in '87, and they estimated they will spend $2.1 million on it during the current year.

Newspapers listed a variety of items, including silver-recovery equipment, lawn mowers and facsimile machines, in the "other" category. ☐

W.R. Grace & Co. acquires Uniroyal unit

The graphic-arts division of Uniroyal Plastics Co. has been acquired by W. R. Grace & Co. for about $20 million.

The Uniroyal product line includes printer's gum and Flex-Light photopolymer printing plates for flexographic printing. ☐

FMC will market Swiss equipment

The Materials Handling Systems Division of FMC Corp. has become the exclusive North American distributor for Von Roll AG, a Swiss firm that manufactures newsprint roll-handling equipment for newspapers.

Under the agreement, FMC will handle the marketing, distribution, service and support for the Von Roll manual and automated systems.

FMC also manufacturers its own line of automated guided vehicles. ☐

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July 1988

The Journal of the American Newspaper Publishers Association

Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

REPORT FROM
ANPA/TEC
'88

presstime

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ANPA/TEC Report *Newspaper people roamed nearly 15 acres of exhibits from 329 vendors at ANPA's 60th Technical Exposition and Conference in Atlanta. They saw everything from bulky presses weighing many tons to computerized disks of information no heavier than a phonograph record. General sessions and workshops focused on the increasing presence of personal computers in all newspaper departments, as well as the latest in waste management technology, press equipment and solutions to various production challenges.* **38**

Vital Engagements *A push to establish more intimate ties with readers has produced a renaissance of society news, formerly the stuff of "women's pages."* **6**

ABCs of Business *Alphabetized indexes of businesses in the day's news are a user-friendly feature of at least three newspapers.* **10**

Many called, few are journalists *Attitudes and laws that traditionally have kept journalists off juries are gradually changing.* **14**

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Terminal stakes *Newspapers and other businesses ponder the effects of enactment of the nation's first VDT-regulation law in private industry.* **70**

Concerns about classified *The classified boom may be over. Whether a bust is in store depends not only on the economy but on the competition.* **82**

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CHAIRMAN'S CORNER

Our National Literacy Day needs newspaper leadership

If one doesn't think literacy in this country is in a state of crisis, try this: Twenty-five million adult Americans are functionally illiterate. Another 35 million are marginal. That's 60 million, or one-third, of the adult U.S. population.

This means that most of these adults cannot even read bus schedules, job applications or their local newspapers. One in four Americans can't figure out if his or her paycheck is correct. And one in five can't address a letter.

The situation is not good, and it's getting worse.

A U.S. Department of Education study calculated that illiteracy in the United States is actually increasing—at a rate of 2.2 million per year. Other studies have ranked the United States as low as 49th among members of the United Nations.

Yet this is not a crisis of numbers, but of real live people. They are our neighbors, living in big cities, working on farms. Some are new immigrants. Many have the capacity to learn but had to drop out of school to earn money.

If you can't read, everyday coping can become a nightmare. A young mother can't read the poison warning on the cleanser bottle. An isolated rural couple can't pass a driving test. These people live at a terrible disadvantage.

Arthur Ochs Sulzberger

Why should newspaper publishers care? This large segment of America represents potential newspaper readers. But that is a long-haul perspective. The more immediate reason is that illiteracy is bad for our communities, our states and our nation. It separates people. It locks them into poverty. It leads to a higher crime rate. It weakens the economy.

It holds *all* of us back.

In the next two months, ANPA will sponsor two important programs to help newspapers promote literacy:

- At the Newspaper Adult Literacy Workshop in Washington, D.C., Aug. 7-9, newspapers will share ideas about their successful adult literacy efforts.
- On National Newspaper Literacy Day Sept. 8, newspapers across the country will sponsor literacy programs, "readathons," and other activities.

Also on Sept. 8, we'll have a symposium in Washington to review the progress in national literacy efforts.

To find out more about these and other events, and how your newspaper can get involved, please call Carolyn Ebel Chandler, manager of literacy programs for ANPA Foundation, at (703) 648-1251. She can also send you "how to" information about local literacy programs and a booklet of examples of how local newspapers have created their own innovative programs to promote literacy. It includes phone numbers and the names of contacts.

One final word. Schools. We must shine a light on local schools to ensure they are doing everything possible to teach students to read and write. It's not a coincidence that National Newspaper Literacy Day is co-sponsored by the International Reading Association, along with ANPA Foundation and ASNE. We need to work with our schools because they can't do it alone. Studies show that no matter how hard a teacher tries, a child whose parents are illiterate probably won't learn to read.

That's why those big numbers are so scary.

Arthur Ochs Sulzberger
ANPA Chairman

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REJECTED LESS OFTEN

Journalists Judged

BY DONALD C. BACON
presstime staff writer

Until recently, a reporter, editor or publisher had about as much chance of serving on a jury as of becoming an astronaut. Trial lawyers, skeptical of having press people decide their cases, routinely fought to keep them out of the jury box. And in many states, exclusionary laws made it easy for journalists, especially those working for newspapers, to avoid such duty altogether.

Today, however, a press pass no longer represents a sure ticket out of jury duty. State jury-selection laws exempting designated occupations, such as law-enforcement officers, medical personnel and journalists, are rapidly disappearing.

Among large newspapers especially, jury service increasingly is being supported for employees of all departments. Some 81 percent of the dailies responding to an ANPA survey last year said they now provide time off at full pay for jury duty, up from 75 percent in 1981. Even trial lawyers, in rare but significant instances, are swallowing their doubts and accepting press members as legitimate jury candidates.

"It didn't seem to matter that I was a reporter; I don't remember that anybody even asked me about it," recalls Margaret Theis, a staff member of The Pantagraph in Bloomington, Ill., and a prospective juror in the McLean County (Ill.) Circuit Court a few years back. Then a part-time Pantagraph reporter, she ultimately served on the jury in a drug trial.

Lawyers historically have tended not to favor reporters and editors as jurors. Newspapers also objected because they were left short-handed. The tide is turning.

Raymond E. Gross, editor and publisher of The Courier-Gazette in Rockland, Maine, was scrutinized more closely when he was summoned for jury duty in Knox County (Maine) Superior Court last fall. In questioning potential jurors for a civil-liability trial, the judge focused hard on Gross's newspaper affiliation and his possible familiarity with the case. He had to convince the judge and the attorneys that he could be objective.

Says Gross, "I told them that I was a professional observer who had spent an entire career trying to be objective." He was surprised at being accepted, he says, "because everything that happens around here sooner or later comes through this newspaper."

Journalists are increasingly likely to find themselves serving on a jury.

LAWYERS' CONCERNS. Although more journalists are being summoned for jury duty, it is still the rule that relatively few actually wind up serving in a trial. The idea of journalists on juries remains a novel, even unthinkable, concept for many lawyers.

Usually, the attorney for one side or the other will ask the court to dismiss a journalist "for cause"—a legal euphemism for suspected prejudice. If the judge refuses, the lawyer likely will use one of his peremptory challenges to eliminate the journalist. Peremptory challenges, a limited number of which are allotted each side in a trial, allow the attorney to dismiss a prospective juror for any reason, or no reason, whatsoever.

"Most reporters and editors get thrown off juries in that way," notes ANPA Assistant General Counsel Tonda F. Rush. Using the peremptory challenge process, a lawyer "can remove someone just because he or she doesn't like that person's looks or skin color," she adds.

Why do journalists—and, indeed, a wide range of other professionals as well—make undesirable jurors in the eyes of many lawyers? Lawyers are first to admit that it usually comes down to a presumption that journalists, as a rule, are too knowledgeable and too inured to emotional appeal to fit the profile of an ideal juror. Rush puts it more bluntly: "Reporters and editors usually know too much."

Philip H. Corboy, a nationally noted trial lawyer, argues that lawyers do not really select jurors to weigh their cases. "It's a myth that lawyers select jurors," the Chicago attorney contends. "They 'deselect' them. That's all a lawyer does. In deselecting, a lawyer for one side or the other will try to get rid of whoever he thinks will harm him. Why are we likely to get rid of newspaper people? Simple. They're smart, they're leaders, they take over people. . . .

"A lawyer wants to take people who are not against him," continues Corboy, who frequently represents plaintiffs in professional- and product-liability cases. "Most lawyers don't want a leader (on his client's jury) unless they know the leader is on their side."

OK for Jury Duty

Corboy cites exceptions, himself included, to that thinking. "I judge each case on an ad hoc basis," he explains. "There may be a reason why I would want an intelligent person on a jury," such as in a complex malpractice or product-liability trial. "Sometimes the more intelligent the juror, the better off the litigant is. . . . An intelligent person does not frighten Corboy. An intelligent person does frighten some lawyers."

Professor Philip B. Kurland of the University of Chicago Law School warns against generalizations of how lawyers view journalists and other professionals as prospective jurors. He admits that "some lawyers feel that reporters are too sophisticated and are not susceptible to their sob-sister stories." But he adds, "In some commercial cases, a lawyer might like to have a very sophisticated person. . . . You can't generalize."

ARE FEARS EXAGGERATED? As for journalists dominating a jury, the experiences of some journalist-jurors indicate the concerns may be exaggerated.

Maine newspaper executive Gross perhaps was the most knowledgeable person on the eight-member panel on which he served, but he did not wind up as foreman. A homemaker was elected, and "she did a tremendous job," he recalls. Gross says he took a relatively passive role in the jury's deliberations, except that "I kind of took charge a couple of times when I felt things were starting to drift off the point."

One whose hackles rise at the mention of exempting journalists from juries is John Guinther, a Philadelphia free-lance writer and author of *The Jury in America*, a new book that examines the jury system. Says Guinther: "Excluding newspeople goes against basic theory that a jury ought to be representative of the community. Newspaper people (and others in the media) are as much a part of the community as any other group. . . . Why should a damn newspaper reporter be different from anybody else?"

Percentage of Newspapers (by Circulation) That Provide Full-Pay Leave for Jury Duty

5,000-25,000	75
25,001-50,000	80
50,001-100,000	84
100,001-250,000	86
More than 250,000	88

Source: ANPA 1987 Personnel Information Survey of the approximately 1,400 ANPA-member newspapers, of which 395 responded.

Most observers agree that lawyers are not the only ones responsible for the sparsity of journalists on juries. Journalists themselves—and the owners of the organizations for which they work—share the burden. "Routinely, up to recently, lawyers kept reporters off juries, and that was perfectly satisfactory to reporters," comments Robert S. Becker, staff attorney for the Reporters Committee for Freedom of the Press.

"I told them that I . . . had spent an entire career trying to be objective."

Raymond E. Gross
The Courier-Gazette, Rockland

State exclusionary laws—which, in effect, declared certain occupations so important to society that the holders of those jobs could not be released for jury duty—were enacted and preserved often not so much to benefit trial lawyers but to relieve certain groups and their employers from a costly and time-consuming civic obligation. Such laws were strongly defended by owners of small businesses, including small newspapers where the absence of even one employee could impair the paper's ability to publish.

The Ely (Nev.) Daily Times (evening, circulation 2,425) perhaps typifies the plight of the small-town newspaper in releasing staff. "Although we are a daily, the staff is just myself and one reporter," says Editor Kent Harper. "If that reporter got called for jury duty, it would have an impact. . . . I guess I would finagle to get him off."

EXCLUSIONARY LAWS. As recently as five years ago, about half the states had exclusionary laws, some of which effectively excluded many occupations from jury service. In California, for instance, "we found that all we were getting on juries were non-working people; nearly everyone was excluded for one reason or another," says Michael B. Dorais, general manager and general counsel of the California Newspaper Publishers Association.

California in the early 1980s became one of the first states to revise its exclusionary law. Today, virtually every California citizen is subject to call for jury service, although lawyers still can and often do try to keep certain people off juries simply because of their occupation. Few California newspaper owners have complained, says Dorais. "It has not been an issue; serving on a jury is recognized as part of the job of a citizen."

Other states have rapidly followed suit, broadening their jury base by wiping out most or all of the previously excluded occupations. Importantly, states at the same time have drastically shortened the requirement for jury service, in most cases adopting the so-called one-day, one-trial system. Some 40 states now use variations of that system, which limits a person's jury-pool requirement to one day or, if assigned to a trial, to the length of that trial. Only occasionally does the person miss more than one day's work.

Among the last holdouts for insulating specific groups from jury duty was Illinois. As late as 1986, the state excluded a wide range of occupations, including even such obscure groups as draymen and ferry operators. In 1986, the Illinois legislature, under heavy lobbying pressure, enacted a reform measure that brought back into the jury system all occupations save two: the editorial and mechanical employees of newspapers. Although members of those two groups

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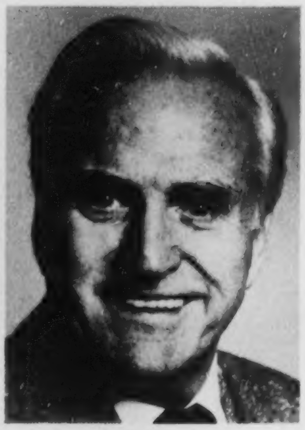
could be summoned for jury service, the law provided that, solely because of their occupation, they could be challenged "for cause" during the jury-selection process.

Preserving the exclusion was a victory for the Illinois Press Association, which had supported the protection out of concern for many of the small "mom-and-pop" operations among its membership. It was a disappointment for the Illinois Associated Press Editors Association, whose executive committee had opposed the exclusion.

No one, however, had counted on newspapers' winding up as the only protected category. The conspicuous exemption may have demonstrated the press's influence in Illinois, but it proved an embarrassment for many executives and staffs of the larger papers—most of which supported jury service as a civic responsibility and routinely granted time off, often at full salary, for such duty. Papers such as the Chicago Sun-Times rewarded jury-bound employees even more, giving them full pay plus permitting them to retain any jury fees that they earned.



Lawyers "deselect" newspaper people because "they're leaders. They take over people."

Philip H. Corboy
Chicago trial lawyer

In 1987, after one year, the jury law again was revised. This time, with the Illinois Press Association taking no position, the newspaper exclusion was removed. Earlier, the resistance of small newspapers had dwindled after they gained assurances of special consideration for hardships resulting from the loss of employees to jury service. Today in Illinois, as in most states, no occupation—including judges themselves—can automatically escape a jury summons.

ENRICHING EXPERIENCE. As for editorial employees, some of whom have written about courts for years but have never seen the inside of a jury room, the experience of serving on a jury is proving more interesting and personally enriching than they had imagined.

Many say they have been particularly impressed by the seriousness and sense of fairness with which juries approach their assignments.

According to jury-authority Guinther, the presence of newspaper people on a jury can, in itself, help contribute to a trial's fairness. Studies have shown that the more broadly based a group is, "the more fair-minded it will be," he says.

After his jury stint, Gross wrote a column for his Rockland, Maine, paper praising the presiding justice's performance.

The increasing participation of journalists, however, is not without complications. Occasionally, the juror's duty not to divulge secret information or jury-room discussions bump up against the journalist's professional obligation to report what he or she knows.

Dorothy Newell, an editor with The Patriot Ledger of Quincy, Mass., faced such a quandary in 1979 when she was selected for a jury in the case of a man charged with raping three teenage girls. Citing the victims' ages, the judge ordered the trial closed. Working reporters, who refused the judge's request to withhold publishing what they heard, were required to leave the courtroom. Newell was sequestered along with the rest of the jury and ordered not to publish the trial testimony.

While the press battled to get back in—The Boston Globe eventually pursuing its appeal for an open trial all the way to the U.S. Supreme Court—the trial went on. Juror Newell found herself locked in something of a reporter's nightmare: Being privy to a major breaking story but being unable to write or even talk about it until the verdict was in and the jury was released. ☐

A Good Try, but . . .

Lyndell Williams, executive vice president of the Texas Press Association, tells of the small-town Texas publisher whose recent effort to escape jury service brought a firm response from the judge.

The publisher, in a lengthy letter to the court, had stated his case. He described his many duties, noted his indispensability and appealed for sympathy. The prospect of jury duty "saddened" him greatly, he said.

The judge, reflecting the judiciary's growing effort to expand the jury base, answered, "My heart is touched that you're so sad—but you're still going to serve."

First consumption drop in 3 years for dailies

U.S. daily newspapers used 1.6-percent less newsprint in April than they did in the same month a year earlier; it marked their first consumption decrease since February 1985. According to the ANPA Newsprint and Transportation Department, the early Easter this year and a slump in retail advertising contributed to the decline.

Newsprint consumption by all U.S. users in April was down nearly 2 percent compared with April 1987—the first such decrease since January 1987.

For the first four months of 1988, total estimated U.S. newsprint consumption was 3,990,503 metric tons, compared with 3,882,046 metric tons for the same period of 1987—an increase of 2.8 percent. For the period consumption by daily newspapers increased 1.9 percent.

Newsprint inventories of newspapers in ANPA's statistical sample averaged a total of 45 days in April, compared with 40 days in April 1987. Canadian production increased 2.3 percent from April 1987, while U.S. production rose 7.5 percent.

Estimated consumption of all U.S. daily newspapers[1]

Region	March 1988(r)	March 1987	% Change
Northeast	200,926	199,433	+ 0.7
North Central	169,135	166,424	+ 1.6
South	252,604	254,876	-0.9
West	182,287	175,655	+ 3.8
Circulation Size			
up to 25,000	65,390	58,717	+ 11.4
25,001-100,000	167,570	169,791	-1.3
Over 100,000	571,992	567,880	+ 0.7
March totals	804,952	796,388	+ 1.1
Three-month totals	2,264,018	2,194,050	+ 3.2
Region	**April 1988(p)**	**April 1987**	**% Change**
Northeast	197,449	199,000	-0.8
North Central	158,466	163,993	-3.4
South	239,012	246,550	-3.1
West	177,799	175,540	+ 1.3
Circulation Size			
up to 25,000	62,689	63,644	-1.5
25,001-100,000	163,489	166,741	-2.0
Over 100,000	546,548	554,698	-1.5
April totals	772,726	785,083	-1.6
Four-month totals	3,036,744	2,979,133	+ 1.9

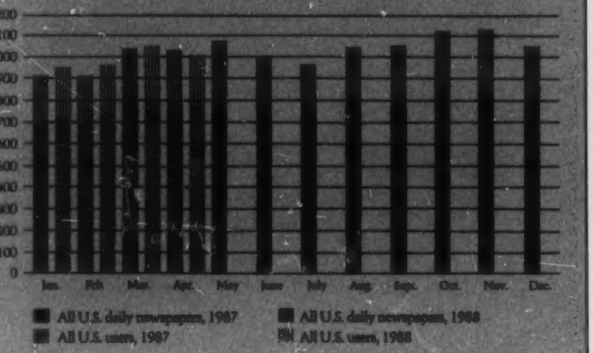
Estimated consumption of all U.S. users

	1988	1987	% Change
February totals	964,229(r)	905,647	+ 6.5(r)
March totals	1,057,275(r)	1,037,369	+ 1.9(r)
April totals	1,011,402(p)	1,031,263	-1.9(p)
Four-month totals	3,990,503(p)	3,882,046	+ 2.8(p)

Production

	Canada	U.S.A.	North America
April 1988	826,229	450,934	1,277,163
April 1987	807,553	419,474	1,227,027
Increase	+ 18,676	+ 31,460	+ 50,136
	+ 2.3%	+ 7.5%	+ 4.1%
Four months 1988	3,336,930	1,800,178	5,137,108
Four months 1987	3,214,815	1,695,009	4,909,824
Increase	+ 122,115	+ 105,169	+ 227,284
	+ 3.8%	+ 6.2%	+ 4.6%

Estimated newsprint consumption, 1987-1988 (thousands of metric tons)



Stocks

U.S. publishers[2]	Tonnage	Days' supply on hand	Days' supply in transit
February 1988	930,981	37(r)	7
February 1987	878,590	35	7
March 1988	962,255	39	6
March 1987	874,026	35	6
April 1988	976,691(p)	39(p)	6(p)
April 1987	869,316	35	5
Canadian mills			
April 1988	358,691	—	—
April 1987	322,751	—	—
U.S. mills			
April 1988	59,892	—	—
April 1987	45,174	—	—

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
April 1988	575,697	100,344	112,567	788,608
April 1987	594,999	95,271	127,409	817,679
Four months 1988	2,337,548	398,410	431,376	3,167,334
Four months 1987	2,292,335	384,468	492,465	3,169,268
Increase or decrease	+ 45,213	+ 13,942	-61,089	-1,934
	+ 2.0%	+ 3.6%	-12.4%	-0.06%
From U.S. mills				
April 1988	419,755		26,318	446,073
April 1987	396,571		31,215	427,786
Four months 1988	1,679,934		96,483	1,776,417
Four months 1987	1,590,548		108,361	1,698,909
Increase or decrease	+ 89,386		-11,878	+ 77,508
	+ 5.6%		-11.0%	+ 4.6%
From North American mills				
April 1988	995,452	100,344	138,885	1,234,681
April 1987	991,570	95,271	158,624	1,245,465
Four months 1988	4,017,482	398,410	527,859	4,943,751
Four months 1987	3,882,883	384,468	600,826	4,868,177
Increase or decrease	+ 134,599	+ 13,942	-72,967	+ 75,574
	+ 3.5%	+ 3.6%	-12.1%	+ 1.6%

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.

(r) = revised (p) = preliminary

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Satellites Riding High In Newspaper Business

August 1988

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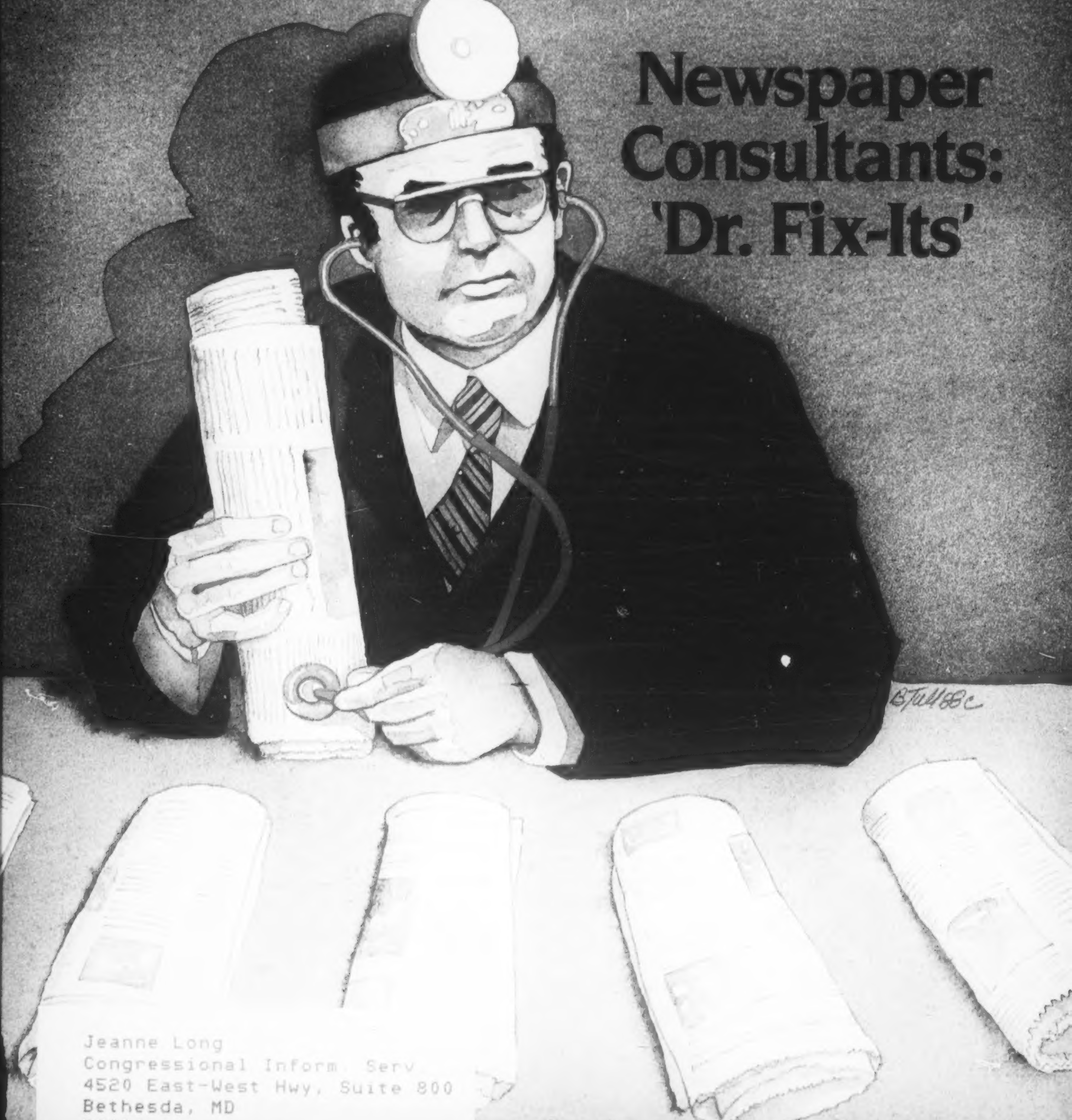
The Journal of the American Newspaper Publishers Association

Newspaper Consultants: 'Dr. Fix-Its'



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Special Report *Newspapers do not like to talk about the extent to which they are used, but consultants are hired to give advice in every area of the newspaper operation, from research to product design, from minority recruiting to mailroom traffic jams. And outside "hired guns" are happy to provide their expertise, for fees ranging from a few hundred dollars to a few hundred thousand. Some publishers believe newspaper associations can provide all the information they need, but others say consultants will play an increasing role as newspapering becomes more complex.* 28

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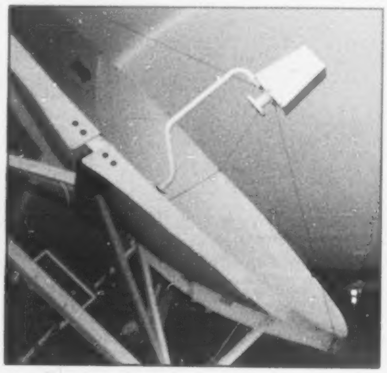

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CHAIRMAN'S CORNER

Costs of defending libel suits may threaten journalistic enterprise

Last April the U.S. Supreme Court left standing a $3-million libel award against CBS. In so doing, the court dramatically broke through the million-dollar ceiling on previously affirmed jury awards. No one yet knows whether this case will prove to be an aberration or a trendsetter, but either way Brown & Williamson's record-breaking award gives us pause to reflect on the cost of libel trials for the press today.

Arthur Ochs Sulzberger

According to the most recently published report of the Libel Defense Resource Center covering the period 1985-86, the average damage award for libel granted by trial courts against media defendants was about $1.1 million. However, the press was successful 75 percent of the time in getting these awards either overturned or greatly reduced. For this reason, the average affirmed libel award through 1986 was about $145,000.

One can expect that number to rise significantly in the next LDRC study period, if only because of the Brown & Williamson award. But even if we treat that case as an aberration, we shouldn't lose sight of the fact that $145,000 represents a significant cost for most newspapers.

A newspaper holding libel insurance can expect to recover a substantial portion of that sum; but in anticipating the cost of a libel suit that goes to trial, an insured publisher must include the price of insurance as well as the amount of the deductible. Libel insurance premium rates doubled in 1984 and again in 1985, following the Westmoreland and Sharon trials. Given the nearly prohibitive rates for libel insurance today, it is probably small consolation to most publishers that insurance industry experts predicted no new rate increases in the wake of the Brown & Williamson case.

And then there is the cost of the lawyers. Today even those libel insurance policies that provide coverage for defense costs require the publisher to bear a substantial part of the attorneys' fees and expenses. Even a "simple" libel trial can easily cost a publisher $150,000 to defend.

These monetary costs represent hard realities for the press today. While the well-trained reporters and editors who are devoted to fair and complete coverage remain the best insurance against libel suits, such actions, like lightning, can strike inexplicably and unpredictably.

Thus, one may conclude that the only way to significantly reduce the high financial risk of libel is to do less high-risk journalism: less reporting about local government, less investigation of local institutions, less probing into the affairs and activities of local citizens.

Although we frequently decry the potential chilling effect of court decisions against the media, it has also been fashionable among publishers and editors to deny that we have actually been chilled. At the least, Brown & Williamson should make us pause before we deny again that libel suits and libel awards have had an impact on our journalism. It seems entirely possible that as the financial risk of libel grows, the true cost of libel may be measured not in average dollar amounts but in the slow disappearance of journalistic enterprise.

And that is a cost we truly cannot afford.

Arthur Ochs Sulzberger

Arthur Ochs Sulzberger
ANPA Chairman

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ANPA releases first industry-wide salary survey

The average salary for a daily newspaper publisher in the United States and Canada is $101,608, and with incentive compensation the figure increases to $120,766.

ANPA's first annual Newspaper Industry Compensation Survey also found these pay averages at daily newspapers:

- For the editor, $60,985 (rising to $70,731 with bonuses)
- For the top advertising executive, $47,685 ($54,618 with bonuses)
- For the top circulation executive, $42,056 ($46,435 with bonuses)
- For the top operations, or production executive, $51,293 ($57,230 with bonuses).

These were among the findings gleaned from 583 responses to a questionnaire distributed earlier this year to all U.S. and Canadian dailies that are members of ANPA or the Inland Daily Press Association. The questionnaire covered pay levels in 59 job categories, ranging from publisher to beginning reporter, and from general manager to advertising artist/copy writer.

ANPA Chairman Arthur Ochs Sulzberger said the 1988 survey "is the first time we've had industry-wide salary information available in a single report. It will be useful to everyone involved in designing and developing compensation programs for newspapers."

ANPA Executive Vice President Thomas C. Fichter, who directed the survey, described it as "a benchmark for tracking the industry salaries in the future."

Copies have been sent to all participating papers.

The data are broken down by circulation (see charts) and by geographic region as well.

Predictably, the newspapers of at least a half-million circulation pay the biggest salaries to their top executives, with averages ranging from $294,575 ($371,376 with incentives) for publishers to $122,231 ($151,795) for top operations executives.

At dailies with circulations up to 5,000, which pay the least, the averages range from $44,933 ($47,298 with bonuses) for publishers to $18,086 (and no bonuses) for the top circulation person.

By region, the highest average base salary for a publisher is $125,280 in the Pacific states of Alaska, Hawaii, California, Oregon and Washington; the lowest base pay for publishers is in the western part of the Midwest (Iowa, Kansas, Missouri, Nebraska, North Dakota and South Dakota), $80,280. Computed in U.S. dollars, Canadian publishers earn an average of $90,504.

Regional differences also are apparent for other job categories. Among editors, for example, those in New England—at the high end of the scale—receive an average base salary of $67,909, while their counterparts in what the survey designates as the eastern Midwest states of Illinois, Indiana, Michigan, Minnesota, Ohio and Wisconsin—at the low end—get an average of $52,358. Those in Canada are paid an average of $59,604.

About 90 percent of the papers with circulations exceeding 250,000 responded, and 33 percent of those of less-than-25,000-circulation did so.

Geographically, about 50 percent of the papers in the U.S. regions responded, while only 12 percent of the Canadian dailies did.

ANPA and other groups coordinated the industry-wide survey in an effort to eliminate duplication resulting from multiple studies by various organizations (**presstime**, Oct. 1987, p. 58).

Professor Hervey A. Juris of the Kellogg Graduate School of Management at Northwestern University supervised the study along with Robert J. Greene of Reward Systems Inc., Glenview, Ill. Data were processed by Inland Daily Press Association.

A daily paper that did not participate in the 1988 study may obtain a copy by agreeing to take part in next year's survey. Contact Juris at (312) 491-8684.

Publisher

Number of newspapers reporting: 351

Summary results

	Lowest	Median	Average	Highest
Base pay	$21,000	$85,000	$101,608	$504,000
Total direct compensation	21,000	96,900	120,766	741,417

By circulation

	Number of newspapers	Average number of employees supervised	Base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	6	23	$ —n/a[2]	$ 48,000	$ 44,993	$ 48,000	$ 47,298
5,001-10,000	38	41	50,000	47,687	55,426	54,500	63,557
10,001-25,000	100	83	66,500	64,000	70,906	73,000	80,483
25,001-50,000	103	165	83,000	83,500	88,825	96,000	104,980
50,001-75,000	30	282	115,300	97,750	108,210	124,308	127,441
75,001-100,000	18	349	117,000	115,400	146,238	138,600	172,623
100,001-150,000	16	442	125,200	145,000	142,559	163,020	170,926
150,001-250,000	18	845	117,000	166,000	178,084	177,000	205,102
250,001-500,000	10	1,153	136,900	208,750	210,515	230,000	266,384
500,000 and over	12	2,823	271,000	272,200	294,575	308,110	371,376

Editor

Number of newspapers reporting: 373

Summary results

	Lowest	Median	Average	Highest
Base pay	$15,072	$52,000	$60,985	$275,000
Total direct compensation	15,072	55,247	70,731	471,000

By circulation

	Number of newspapers	Average number of employees supervised	Base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	7	7	$ 23,374	$ 24,850	$ 23,506	$ 24,850	$ 23,506
5,001-10,000	28	9	27,757	27,300	29,114	28,612	30,279
10,001-25,000	92	22	38,480	37,700	41,093	38,923	42,914
25,001-50,000	113	39	55,000	48,024	50,140	51,180	56,181
50,001-75,000	40	71	71,000	59,750	62,827	67,500	69,799
75,001-100,000	20	85	83,000	63,769	67,852	69,800	80,814
100,001-150,000	21	108	73,400	78,000	81,250	94,000	92,512
150,001-250,000	22	181	92,000	96,250	102,193	121,500	118,061
250,001-500,000	16	219	105,586	115,387	116,853	144,800	145,057
500,000 and over	14	480	199,997	186,000	200,999	213,500	257,583

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[1] Median of midpoints of pay ranges reported.

[2] No newspapers in this circulation category reported a range of compensation.

[3] Not sufficient data—fewer than three newspapers reported.

Top advertising executive

Number of newspapers reporting: 350

Summary results

	Lowest	Median	Average	Highest
Base pay	$ 15,000	$ 41,800	$ 47,685	$175,000
Total direct compensation	18,304	44,980	54,618	323,916

By circulation

	Number of newspapers	Average number of employees supervised	Base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	5	5	$ 34,346	$ 26,780	$ 25,964	$ 26,780	$ 26,596
5,001-10,000	30	6	25,168	24,856	25,156	26,072	27,481
10,001-25,000	115	14	36,764	32,217	32,640	33,843	35,095
25,001-50,000	81	26	55,000	43,730	43,681	47,666	49,941
50,001-75,000	29	44	71,000	53,000	54,502	61,500	60,872
75,001-100,000	23	73	73,424	58,499	59,804	64,504	67,364
100,001-150,000	18	63	56,448	59,900	62,768	72,423	77,239
150,001-250,000	23	130	92,000	78,520	78,407	87,612	90,808
250,001-500,000	15	182	90,595	88,200	91,162	100,000	108,469
500,000 and over	11	233	116,600	103,000	114,575	122,837	154,347

Top circulation executive

Number of newspapers reporting: 507

Summary results

	Lowest	Median	Average	Highest
Base pay	$9,500	$36,400	$42,056	$225,000
Total direct compensation	9,500	38,500	46,435	275,000

By circulation

	Number of newspapers	Average number of employees supervised	Base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	6	42	$ n/a[2]	$ 17,860	$ 18,086	$ 17,860	$ 18,086
5,001-10,000	47	14	23,452	20,900	21,575	22,180	22,510
10,001-25,000	163	19	34,060	28,640	29,852	29,661	31,029
25,001-50,000	141	39	51,000	37,500	39,152	40,976	43,007
50,001-75,000	45	81	63,000	50,100	48,647	52,750	54,663
75,001-100,000	25	110	67,000	53,000	54,665	60,000	6[illegible],744
100,001-150,000	24	91	57,162	57,949	58,614	65,000	67,737
150,001-250,000	26	239	83,000	69,450	68,312	75,300	76,705
250,001-500,000	17	831	83,000	76,000	81,260	89,096	93,737
500,000 and over	13	868	124,050	101,000	122,090	122,250	149,057

Top operations (production)

Number of newspapers reporting: 351

Summary results

	Lowest	Median	Average	Highest
Base pay	$10,000	$45,427	$51,293	$255,000
Total direct compensation	10,000	49,000	57,230	353,250

By circulation

	Number of newspapers	Average number of employees supervised	Base pay			Total direct compensation (base plus incentive)	
			Range midpoint[1]	Median	Average	Median	Average
5,000 or less	4	nsd[3]	nsd[3]	nsd[3]	nsd[3]	nsd[3]	nsd[3]
5,001-10,000	25	15	28,244	26,790	27,287	26,790	28,330
10,001-25,000	72	30	38,000	34,405	35,004	36,100	37,192
25,001-50,000	104	48	51,000	42,400	42,823	46,395	46,791
50,001-75,000	43	78	63,000	51,375	52,711	54,800	57,281
75,001-100,000	25	145	71,000	55,000	60,423	60,500	67,082
100,001-150,000	23	154	63,100	60,000	65,807	71,900	73,204
150,001-250,000	26	281	83,000	71,820	73,335	82,500	86,260
250,001-500,000	19	467	75,170	74,620	80,965	87,000	94,859
500,000 and over	13	1,137	104,500	110,000	122,231	119,215	151,795

NPRA to accept associate memberships; dues to be set

The Newspaper Personnel Relations Association has opened its membership to professionals outside the newspaper industry who "actively provide human resources services" to newspapers.

The NPRA at its annual meeting adopted an amendment to its constitution that will allow such outsiders as lawyers, psychologists and human relations consultants to be eligible for an associate membership. Associate members will not be allowed to vote on association affairs or serve on the board of directors, but they will be eligible to serve on committees.

Mark W. Ingham

The total associate membership will not be allowed to exceed 25 percent of the regular membership.

In order to become an associate, applicants must be recommended by a regular member of the association. Dues for associate members will be determined by the NPRA board.

The action was approved by a substantial majority of the approximately 180 NPRA members who attended the organization's 40th annual conference June 26-29 in San Diego.

Terry T. Travelstead, vice president/personnel of USA Today, was elected president for a one-year-term. John J. Swingle, employee relations manager at the Journal Star, Peoria, Ill., was elected vice president, and James R. Schober, employee relations director at the San Jose Mercury News, was elected secretary-treasurer.

The 500-member organization also formed a minority affairs committee and a professional development committee.

Also during the convention, the board named Mark W. Ingham NPRA executive director, succeeding Patricia P. Renfroe, who will now devote full attention to her responsibilities as manager of personnel relations for ANPA.

Like Renfroe, Ingham is on the staff of the ANPA Human Resources Department, where he is personnel relations associate. A former director of training for a group of Holiday Inns, he has a bachelor of science degree in speech and communication from Clarion (Pa.) University and a master's degree in human resource development from American University, Washington, D.C. ☐

1987 consumption of U.S. dailies increased 2.9 percent to another record high

Daily newspapers in the United States consumed 9,124,666 metric tons of newsprint in 1987—the fourth straight year of record use. The total was 2.9-percent higher than the previous record of 8,865,127 tons set a year earlier.

ANPA's annual state-by-state survey of newsprint consumption also shows that Arkansas had the largest percentage increase between 1986 [48,679 tons] and 1987 [59,697], 22.6 percent. Next highest were Connecticut [15.7 percent], New Hampshire [13.4 percent], Nevada and South Dakota [12.9 percent each], and New Jersey [11.2 percent].

California led the nation in total consumption—1,285,435 tons, 14.1 percent of the national total—and it had the biggest increase in actual tonnage consumed, 75,490 tons.

Net increases in consumption were recorded in 34 states as well as in the District of Columbia. Alaska had the largest percentage decrease, 13.3, or 2,775 tons. Texas had the biggest decrease in tonnage, 51,292 tons.

Regionally, the Northeast had the largest percentage increase in newsprint use between 1986 [2,215,977 tons] and 1987 [2,339,477]—5.6 percent. The Western states followed at 3.9 percent. Then came the North Central region at 2 percent and the South at 0.7 percent.

The annual ANPA survey [**presstime**, July 1987, p. 76] covered 1,726 general-circulation daily newspapers as well as some foreign-language, college and special-service dailies such as trade newspapers. Together, they accounted for 74 percent of 1987's estimated newsprint consumption by all U.S. users of 12,323,000 tons—an increase of 3.2 percent and also a record.

All users include weekly newspapers, commercial printers, free-distribution publications, comic sections and the government.

The 2.9-percent increase in consumption by U.S. dailies supersedes a preliminary estimate that had indicated an increase of 4.9 percent [**presstime**, April 1988, p. 73]. The preliminary estimate was based on data from newspapers in ANPA's statistical sample. The new consumption report was based on a survey of every daily newspaper in the United States. □

State-by-state newsprint consumption by U.S. daily newspapers*

	1987	1986	% change
Alabama	76,920	73,747	4.3
Alaska	18,155	20,930	-13.3
Arizona	146,146	145,578	0.4
Arkansas	59,697	48,679	22
California	1,285,435	1,209,945	6.7
Colorado	188,544	190,968	-1.3
Connecticut	120,126	103,844	15.7
Delaware	18,722	16,952	10.4
District of Columbia	254,302	241,695	5.2
Florida	592,030	568,719	4.1
Georgia	208,614	198,892	4.9
Hawaii	30,956	27,868	11.1
Idaho	15,521	15,793	-1.7
Illinois	456,119	445,436	2.4
Indiana	148,218	143,167	3.5
Iowa	74,023	73,612	0.6
Kansas	41,935	42,158	-0.5
Kentucky	71,442	71,914	-0.7
Louisiana	111,279	117,918	-5.6
Maine	27,079	24,375	11.1
Maryland	124,442	116,012	7.3
Massachusetts	328,674	307,492	6.9
Michigan	333,828	332,537	0.4
Minnesota	135,663	128,161	5.9
Mississippi	35,417	36,191	-2.1
Missouri	180,190	171,347	5.2
Montana	12,299	12,714	-3.3
Nebraska	46,067	46,280	-0.5
Nevada	44,799	39,677	12.9
New Hampshire	23,878	21,059	13.4
New Jersey	395,041	355,148	11.2
New Mexico	28,986	29,062	-0.3
New York	963,030	924,216	4.2
North Carolina	170,114	159,656	6.6
North Dakota	13,350	13,096	1.9
Ohio	345,066	344,077	0.3
Oklahoma	71,216	79,205	-10.1
Oregon	93,806	93,570	0.3
Pennsylvania	429,585	430,116	-0.1
Rhode Island	43,541	41,010	6.2
South Carolina	72,988	71,446	2.2
South Dakota	10,895	9,649	12.9
Tennessee	120,417	119,182	1.0
Texas	659,329	710,621	-7.2
Utah	35,202	37,719	-6.7
Vermont	8,523	8,716	-2.2
Virginia	144,773	142,713	1.4
Washington	139,349	137,564	1.3
West Virginia	32,284	29,904	8.0
Wisconsin	130,532	128,418	1.6
Wyoming	6,119	6,379	-4.1
Total	9,124,666	8,865,127	2.9

Regional newsprint consumption by U.S. daily newspapers*

	1987		1986		
	Number of newspapers	Consumption	Number of newspapers	Consumption	% change
Northeast	302	2,339,477	310	2,215,977	5.6
North Central	540	1,915,886	545	1,877,938	2.0
South	580	2,823,986	589	2,803,445	0.7
West	304	2,045,317	307	1,957,767	3.9
Total	1,726	9,124,666	1,751	8,865,127	2.9
Total consumption by all U.S. users		12,323,000		11,937,000	3.2

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*Metric tons

Smurfit mills operate as workers strike

The Association of Western Pulp & Paper Workers in early July struck Smurfit Newsprint Corp.'s Newberg and Oregon City, Ore., mills, but the company used supervisory personnel to continue operations there. Contracts expired March 15 at the Oregon City mill and April 1 at Newberg. The walkout was not directly related to the timber-industry strike in the Pacific Northwest that began in June.

Meanwhile, negotiations continue between the United Paperworkers International Union and Manistique Papers Inc.'s Manistique, Mich., mill. The contract there expired June 15.

In Canada, the Canadian Paperworkers Union and the Pulp, Paper & Woodworkers of Canada in mid-July tentatively agreed to a three-year contract in British Columbia negotiations, which include four mills. Contracts expired June 30. It reportedly provides for general wage increases of 85 cents an hour in the first year and 5.5 percent in each of the second and third years.

Negotiations continue between the CPU and Kruger Inc.'s Corner Brook, Newfoundland, mill, where the contract expired May 31 [**presstime**, June 1988, p. 132]. □

Merger approved

Great Lakes Forest Products Ltd. shareholders approved the merger of the company with CIP Inc.

The merged company—with newsprint mills at Gatineau and Trois-Rivieres, Quebec; Thunder Bay, Ontario; and Dalhousie, New Brunswick—is now operating as Canadian Pacific Forest Products Ltd. It is 79.7-percent owned by Canadian Pacific Ltd. [**presstime**, June 1988, p. 134]. □

Consumption drops second straight month

U.S. daily newspapers used 0.9-percent less newsprint in May compared with May 1987—the second straight month in which consumption dropped.

But for the first five months of the year combined, their consumption was still 1.5-percent higher than it was for the same period of 1987.

Newsprint consumption by all U.S. users also declined in May, down 1.7 percent from May 1987, but in the five-month period it increased 2.0 percent.

Newsprint inventories of newspapers in ANPA's statistical sample averaged 46 days in May, compared with 41 days in May 1987.

Shipments from Canadian mills were 1.0-percent higher during the month compared with May 1987, while those from U.S. mills rose 4.1 percent.

Canadian newsprint mills in May and year-to-date operated at 100 percent of rated capacity. U.S. mills operated at 99.2 percent of rated capacity in May and at 98.4 percent year-to-date.

Estimated consumption of all U.S. daily newspapers[1]

Region	**April 1988(r)**	**April 1987**	**% Change**
Northeast	201,185	199,000	+ 1.1
North Central	157,716	163,993	-3.8
South	239,313	246,550	-2.9
West	180,148	175,540	+ 2.6
Circulation Size			
up to 25,000	63,311	63,644	-0.5
25,001-100,000	166,475	166,741	-0.2
Over 100,000	548,576	554,698	-1.1
April totals	778,362	785,083	-0.9
Four-month totals	3,042,380	2,979,133	+ 2.1
Region	**May 1988(p)**	**May 1987**	**% Change**
Northeast	206,928	213,356	-3.0
North Central	171,106	171,884	-0.5
South	246,684	250,411	-1.5
West	183,802	179,900	+ 2.2
Circulation Size			
up to 25,000	64,915	63,250	+ 2.6
25,001-100,000	172,433	172,652	-0.1
Over 100,000	571,172	579,649	-1.5
May totals	808,520	815,551	-0.9
Five-month totals	3,850,900	3,794,684	+ 1.5

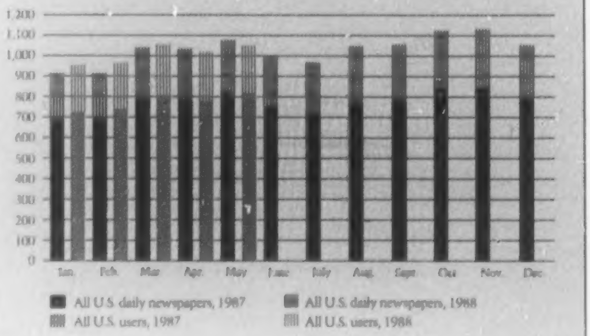
Estimated consumption of all U.S. users

	1988	1987	% Change
February totals	963,880(r)	905,647	+ 6.4(r)
March totals	1,059,279(r)	1,037,369	+ 2.1(r)
April totals	1,018,258(r)	1,031,263	-1.3(r)
May totals	1,055,053(p)	1,072,851	-1.7(p)
Five-month totals	5,054,067(p)	4,954,897	+ 2.0(p)

Production

	Canada	U.S.A.	North America
May 1988	859,961	466,050	1,326,011
May 1987	815,871	453,841	1,269,712
Increase	+ 44,090	+ 12,209	+ 56,299
	+ 5.4%	+ 2.7%	+ 4.4%
Five months 1988	4,196,891	2,266,228	6,463,119
Five months 1987	4,030,686	2,148,850	6,179,536
Increase	+ 166,205	+ 117,378	+ 283,583
	+ 4.1%	+ 5.5%	+ 4.6%

Estimated newsprint consumption, 1987-1988 (thousands of metric tons)



Stocks

U.S. publishers[2]	Tonnage	Days' supply on hand	Days' supply in transit
March 1988	962,255	39	6
March 1987	874,026	35	6
April 1988	971,780	40(r)	6
April 1987	869,316	35	5
May 1988	968,135	40(p)	6(p)
May 1987	847,549	35	6
Canadian mills			
May 1988	362,944	—	—
May 1987	323,378	—	—
U.S. mills			
May 1988	63,197	—	—
May 1987	46,668	—	—

Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
May 1988	591,365	107,108	157,235	855,708
May 1987	586,327	95,067	133,850	815,244
Five months 1988	2,928,913	505,518	588,611	4,023,042
Five months 1987	2,878,662	479,535	626,315	3,984,512
Increase or	+ 50,251	+ 25,983	-37,704	+ 38,530
decrease	+ 1.7%	+ 5.4%	-6.0%	+ 1.0%
From U.S. mills				
May 1988	434,972		27,773	462,745
May 1987	427,085		25,262	452,347
Five months 1988	2,114,906		124,256	2,239,162
Five months 1987	2,017,633		133,623	2,151,256
Increase or	+ 97,273		-9,367	+ 87,906
decrease	+ 4.6%		-7.0%	+ 4.1%
From North American mills				
May 1988	1,026,337	107,108	185,008	1,318,453
May 1987	1,013,412	95,067	159,112	1,267,591
Five months 1988	5,043,819	505,518	712,867	6,262,204
Five months 1987	4,896,295	479,535	759,938	6,135,768
Increase or	+ 147,524	+ 25,983	-47,071	+ 126,436
decrease	+ 3.0%	+ 5.4%	-6.2%	+ 2.1%

[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

9/6/88 A2350-2

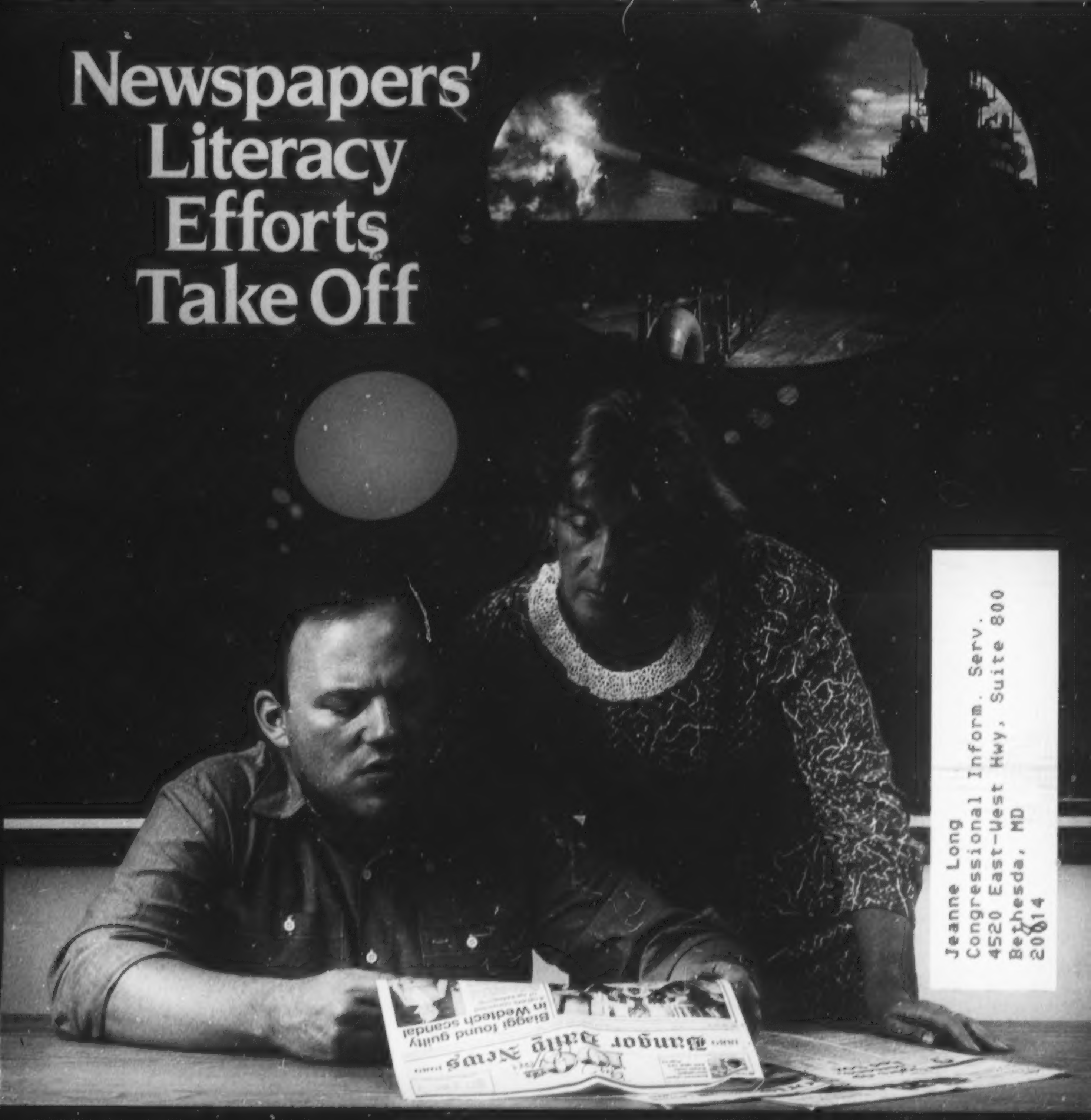
Going Beyond Crimes
In Police Beat Coverage

September 1988

presstime

The Journal of the American Newspaper Publishers Association

Newspapers' Literacy Efforts Take Off


Bangor Daily News
Biaggi found guilty in Wedtech scandal

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20814

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Special Report *Newspapers are fighting illiteracy, a specter threatening the vitality of democracy and the prosperity of newspapers. Increasingly, newspaper executives believe that rising illiteracy and declining household penetration are no coincidence. For that and other reasons, literacy programs all over the country are flourishing with newspaper involvement. Never before have so many newspapers undertaken such activism for a cause, going far beyond the traditional editorial crusade. Still, hundreds have yet to act. Here's why they should and how they can.* **26**

Covering the cops *Going beyond breaking news to the human-interest angle is one way reporters are bringing new glamour to the police beat.* **6**

Anonymous sources *Norman Isaacs says it's past time for editors to assert themselves and to set some tough rules on granting confidentiality.* **12**

Nine-digit ZIP *The Postal Service hasn't convinced newspapers yet that adding another four numbers to the address code is good for business.* **14**

Mixed signals *Telephone-based information services are, at once, a potential gold mine for newspapers and a source of unnerving competition.* **16**

Laying out the ads. *Computerized display ad systems can do more for less than when they first appeared at newspapers about 15 years ago.* **24**

Taking care of business *About half of the nation's journalism schools are teaching or planning media management courses.* **34**

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Essay: A test of vision *Resources abound to help newspapers make a long-term commitment to literacy, says Times Mirror Chairman Robert F. Erburu.* **40**

JOA limbo *The Detroit News and Detroit Free Press continue separate, and costly, operations while a federal court decides whether a JOA was lawfully granted.* **44**

Counting minorities *ANPA benchmark survey shows newspapers trail industry averages in recruitment and advancement of minorities and women.* **54**

Political advertising *Despite aggressive campaigns to snare political ad dollars, sales have been nearly as sluggish as in previous election years.* **56**

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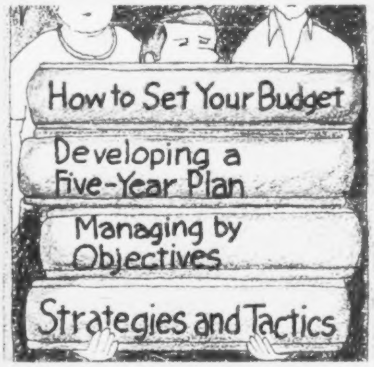

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CHAIRMAN'S CORNER

Electronic information: Can newspapers exploit it?

After a period of public-policy positioning and a March decision from U.S. District Judge Harold H. Greene, U.S. telephone companies are starting to announce and to deploy specialized services that will have a substantial impact on our industry for years.

Since that March decision, the Bell operating companies, or BOCs, have signaled their intention to use their telephone network to offer services as diverse as a telemarketer's version of Advo and electronic "gateways," which are sort of invisible bridges that can link users with anyone who wishes to provide information or communications services.

ANPA's public-policy position remains concise and precise. We believe the owner of monopoly transmission facilities ought not to have any "ownership" or involvement in the information being transmitted. We expect to reinforce that position in Washington, D.C., and increasingly in the states as well.

Judging how the marketplace will respond is difficult. ANPA policy encourages the use of telephone company facilities—by other than the BOCs—to offer information and communication services to the public. So now the focus of our decade-long effort to understand and use this available technology is on ways it can augment and enhance our basic business—newspapers.

Arthur Ochs Sulzberger

Your Board of Directors is aware of the challenge. To help our business respond, several of our most knowledgeable colleagues have volunteered to lead our assessment and exploitation explorations. One group of senior newspaper executives led by former ANPA Chairman George Wilson of the Concord (N.H.) Monitor is meeting with top executives of the regional telephone companies to discuss personally any public-policy differences and to establish contacts for future business dealings. Meanwhile, Jim Longson of the New York Daily News is leading another group that is reviewing the past and assessing the future, preparing—with staff and Booz, Allen & Hamilton's consulting help—a "white paper" on electronic-information opportunities and threats. When this report is ready, each of us will be able to study and apply it to our individual markets and circumstances.

Both action groups will shortly report back to the Telecommunications Committee chaired by ANPA Director Frank Blethen, publisher of The Seattle Times. We actively invite your comments during this process. Call your ANPA staff or the involved newspaper executives.

The challenge before us is not an easy one. A number of large communications companies with substantial resources have dipped a finger or two into the world of electronic information, and the wounds are slow to heal. But that doesn't mean we should lie down and play dead as the telephone companies try to move into our business. We, too, have experience, talent and clout; and we should use them. But wisely—and that is what this exercise is all about.

Arthur Ochs Sulzberger
ANPA Chairman

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ANPA releases benchmark survey

A benchmark ANPA survey on minority employment at U.S. daily newspapers shows that 16.1 percent of the industry's work force is made up of blacks, Hispanics, Asian Americans or Native Americans.

Newspapers lag behind the total U.S. civilian work force that is 21-percent minority.

It is the same story with women. The ANPA survey found that 37 percent of newspaper employees are women. In the U.S. work force, that figure is 47 percent.

The findings correspond closely to reports of the federal Equal Employment Opportunity Commission that total minority employment at newspapers was 15.7 percent in 1985 [**presstime**, April 1988, p. 26]. The EEOC requires reports on minority and female employment from companies with 100 employees or more.

According to the ANPA survey, conducted this spring, minorities are least-represented in the managerial and professional job categories of all newspaper departments. (See table, p. 55.) Overall, 7 percent of executives and managers, and 10 percent of professional and technical employees, are minorities, the ANPA survey found. Within the total U.S. work force, those percentages are 12 and 16, respectively.

The news-editorial, marketing and advertising departments have the least amount of minority representation.

Production, circulation and a category called "general management" (encompassing positions ranging from publishers to janitors) had the highest.

Members of ANPA's Minority Opportunity Committee said the survey's primary value lies in the numbers themselves.

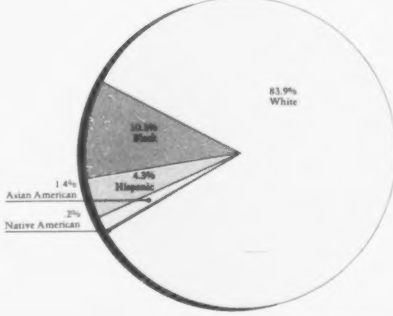
"We have been running the race for a good while, but we now have some mile markers to show us how fast we are going," said Chairman Jay Smith, publisher of The Atlanta Journal and The Atlanta Constitution.

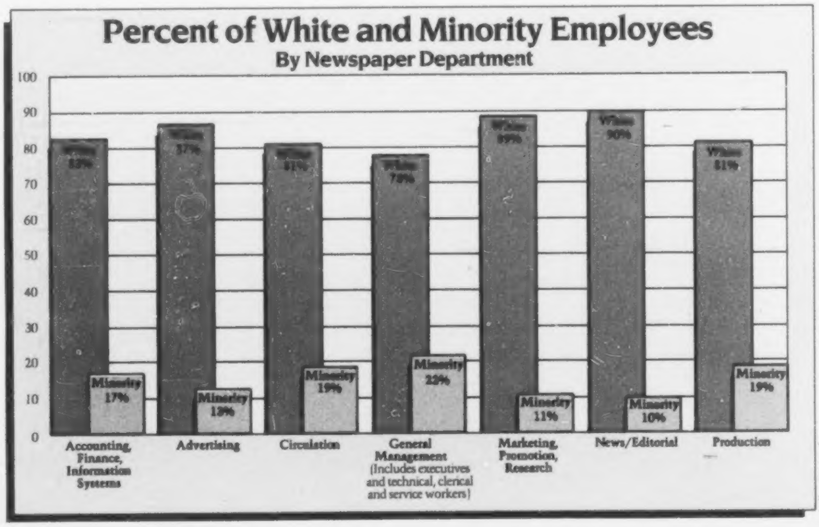
"To the best of my knowledge, no industry besides our own has ever attempted to do this," Smith said. "I think that, in and of itself, took a lot of courage."

Vice Chairman Karen A. Howze, managing editor of USA Today's international edition, said the survey's findings were not surprising. "I look at the survey as the beginning," she said.

Of particular importance were the low figures in managerial and professional categories, she said. "We really need to look at that and make sure we are talking about moving upward."

Racial Mix of Newspaper Business Overall





Alberto Pacheco

Loren F. Ghiglione, publisher and editor of The News of Southbridge, Mass., said he is "delighted that we finally have the numbers."

"The major message is that the industry has to do a lot better, particularly in the management areas," said Ghiglione, who has been chairman of the Minority Committee of the American Society of Newspaper Editors and of the Task Force on Minorities in the Newspaper Business. "If this encourages commitment, that's a big plus."

ANPA President Jerry W. Friedheim said, "The usefulness of this tool will be two to five years down the road, when we are able to replicate it . . . and we see whether our programs are producing any progress."

Commissioned by ANPA and conducted by Belden Associates of Dallas, the survey was based on responses from 546 newspapers representing 502 markets. Questionnaires were mailed to 1,443 newspapers, including ANPA members and non-members. The response rate was 35 percent of markets, 37.8 percent of newspapers. Belden estimated the possible margin of error as plus or minus 4 percent.

Smith of the Atlanta papers said he was reluctant to draw quick conclusions about the differing levels of minority representation among newspaper departments.

"I think that some departments performed at higher levels because they have jobs which have historically been filled by minorities," such as circulation and production, he said. Comparisons that don't account for such differences, Smith said, "are invidious, dangerous and unfair."

Thirty-eight percent of the responding newspapers said they had active, voluntary, affirmative-action programs. They were the most likely to use all possible methods of minority recruitment.

Those newspapers rated the following minority recruitment methods the most highly: job fairs (77 percent), recruiting at minority colleges (74 percent), minority seminars and conferences (70 percent), advertising in their own newspaper (68 percent) and recruiting at non-minority colleges (66 percent).

Among all respondents, the most common methods of minority recruitment were advertising in their own newspaper (74 percent); job fairs (47 percent); advertising in trade publications (46 percent); and recruiting at non-minority colleges (44 percent).

Percent of Minority Newspaper Executives and Managers

	Black	Hispanic	Asian American	Native American	Total
Accounting, Finance, Information Services	4	2	2	*	8
Advertising	4	2	1	*	7
Circulation	6	4	1	*	11
General Management	5	2	*	*	7
Marketing, Promotion, Research	4	1	1	*	6
News/Editorial	3	1	1	*	5
Production	5	2	*	1	8

*Less than one-half of 1 percent.

Following are the survey's summary results by department:

- **News-editorial** has the smallest minority representation, 10 percent, of all newspaper departments. Eliminating clerical and administrative support staff, the figure drops to 8 percent of newsroom professionals, slightly higher than the 7.02-percent figure in the last annual survey by the American Society of Newspaper Editors [**presstime**, May 1988, p. 68].

Minorities also make up 5 percent of newsroom supervisors; 7 percent of copy editors; 9 percent of reporters or writers; 10 percent of photographers or artists; 18 percent of clerical or administrative support; and 14 percent "other."

Women make up 37 percent of news-editorial employees.

- **Marketing-promotion-research** departments have 11-percent minority employment—6 percent of executives and managers; 7 percent of professional and technical employees; 22 percent of clerical or administrative support; and 15 percent "other."

Women make up 63 percent of employees in these areas.

- **Advertising** departments have 13-percent minority employment—7 percent of executives and managers; 10 percent of professional and technical employees; 12 percent of salespeople; 20 percent of clerical or administrative support and 21 percent "other."

Women make up 66 percent of these employees.

- **Accounting-finance-information services** have 17-percent minority employment—8 percent of executives and managers; 16 percent of professional and technical employees; 20 percent of clerical or administrative support; and 25 percent "other."

Women make up 67 percent of these employees.

- **Production** departments have 19-percent minority employment—8 percent of executives or managers; 10 percent of professional and technical employees; 11 percent of skilled craftspeople; 17 percent of operators (semi-skilled); 28 percent of clerical or administrative support; 53 percent of service workers; and 27 percent "other."

Women make up 19 percent of production employees.

- **Circulation** departments have 19-percent minority employment—11 percent of the executives or managers; 10 percent of professional or technical employees; 20 percent of salespeople; 16 percent of skilled craftspeople; 20 percent of operators (semi-skilled); 24 percent of clerical or administrative support; and 21 percent "other."

Women make up 33 percent of circulation employees.

- **General Management** categories had the highest minority representation, 22 percent. However, the category encompasses publishers, other top executives and professionals, as well as janitorial and other service and clerical workers.

Minorities are 7 percent of executives or managers; 11 percent of professional or technical employees; 19 percent of clerical or administrative support; 42 percent of service workers; and 17 percent "other."

Women make up 45 percent of employees in this category.

Copies of the report are available from the ANPA Human Resources Department, The Newspaper Center, Reston, Va.

—Mary A. Anderson

Videotape showcases minority opportunities

A new videotape aimed at high school and college students, emphasizing opportunities for women and minorities at newspapers, is now available from ANPA Foundation and the Task Force on Minorities in the Newspaper Business.

"You've got a Lot to Offer—We've Got a Lot to Gain" is a 14-minute video produced by the Chicago Tribune Co. for use at career days, job fairs and other recruiting programs. Narrated by actor Mason Adams, who portrayed Ed Asner's managing editor on the former television series "The Lou Grant Show," it features interviews with minority and non-minority employees who are making contributions at newspapers of all sizes.

The video, with brief guides for teachers and recruiters, is available for $20, or at a discount for orders of five or more. For further information, contact Melinda Machado, Task Force on Minorities in the Newspaper Business, The Newspaper Center, Reston, Va. (703) 648-1285. ☐

Gates named to ASNE post

The American Society of Newspaper Editors has named Mireille Grangenois Gates as its new minority affairs director.

Gates, 32, had worked as a reporter for USA Today since its inception six years ago. Prior to that, she was a business reporter in the Detroit bureau of Business Week magazine and a general assignment reporter for The Baltimore Sun. She graduated from New York University, where she studied journalism and history.

Mireille G. Gates

Gates is a member of the National Association of Black Journalists and was a founding member of that organization's Detroit chapter. She has lectured frequently on the topic of minorities in the newsroom. She also has provided weekly radio commentary on civil rights and minority affairs for Gannett News Service Radio.

She succeeded Denise Johnson, who returned to the St. Paul Pioneer Press Dispatch. ☐

Minority journalists cite slow progress

Nine of every 10 minority journalists say the media have done little to integrate newsrooms, according to a University of Missouri survey.

Ninety-one pecent of the 104 minority journalists responding to the survey, when asked whether media managers are "doing all they can," said no. When asked whether those managers are "trying hard enough" to achieve parity, 72 percent said no.

The results show "media managers are not pushing to achieve parity in their newsrooms," said Ben Johnson, managing editor of the Columbia Missourian, the daily produced by the journalism school.

Results of the poll were published in the 1988 edition of *Who's What and Where*, a directory of minorities in the media prepared by Johnson and his wife, Mary Bullard-Johnson. Both are instructors at Missouri's School of Journalism.

The university's Missouri Media Research Bureau distributed the survey to 267 minority newspaper, magazine and broadcast journalists selected from 4,000 listed in the directory. The 104 responses yielded a 39-percent response rate. ☐

June consumption gain ends two-month drop

U.S. daily newspapers used 0.7 percent more newsprint in June compared with June 1987, reversing a two-month decline. For the first six months of 1988, their consumption was up 1.3 percent compared with the same period a year earlier.

Likewise, consumption by all U.S. users climbed in June after two months of declining use compared with 1987 figures. It was up 0.3 percent during the month and 1.9 percent for the first half of the year.

Newsprint inventories of newspapers in ANPA's statistical sample averaged a total of 51 days in June, compared with 47 days in June 1987.

June's shipments from Canadian mills were down 6.8 percent from June 1987. Canadian shipments to the United States decreased 4.8 percent, while those overseas increased 9.6 percent.

Shipments from U.S. mills dropped 0.6 percent. Domestic shipments were down 1.3 percent while shipments overseas were up 12.8 percent.

Estimated consumption of all U.S. daily newspapers[1]

Region	May 1988(r)	May 1987	% Change
Northeast	208,682	213,356	-2.2
North Central	170,570	171,884	-0.8
South	247,348	250,411	-1.2
West	180,742	179,900	+ 0.5
Circulation Size			
up to 25,000	65,112	63,250	+ 2.9
25,001-100,000	169,005	172,652	-2.1
Over 100,000	573,225	579,649	-1.1
May totals	807,342	815,551	-1.0
Five-month totals	3,849,722	3,794,684	+ 1.5
Region	**June 1988(p)**	**June 1987**	**% Change**
Northeast	195,870	197,347	-0.7
North Central	163,557	158,474	+ 3.2
South	227,283	224,446	+ 1.3
West	170,919	172,377	-0.8
Circulation Size			
up to 25,000	59,957	58,939	+ 1.7
25,001-100,000	158,571	161,306	-1.7
Over 100,000	539,101	532,399	+ 1.3
June totals	757,629	752,644	+ 0.7
Six-month totals	4,607,351	4,547,328	+ 1.3

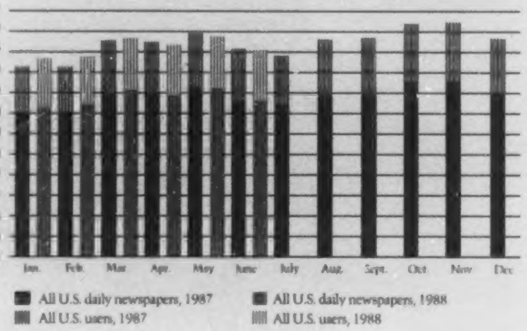
Estimated consumption of all U.S. users

	1988	1987	% Change
April totals	1,023,484(r)	1,031,263	-0.8(r)
May totals	1,063,099(r)	1,072,851	-0.9(r)
June totals	999,399(p)	996,326	+ 0.3(p)
Six-month totals	6,066,738(p)	5,951,223	+ 1.9(p)

Production

	Canada	U.S.A.	North America
June 1988	798,564	444,799	1,243,363
June 1987	806,322	444,287	1,250,609
Increase or decrease	-7,758 -1.0%	+ 512 + 0.1%	-7,246 -0.6%
Six months 1988	4,995,455	2,711,027	7,706,482
Six months 1987	4,837,008	2,593,137	7,430,145
Increase	+ 158,447 + 3.3%	+ 117,890 + 4.5%	+ 276,337 + 3.7%

Estimated newsprint consumption, 1987-1988 (thousands of metric tons)



Stocks

U.S. publishers[2]	Tonnage	Days' supply on hand	Days' supply in transit
April 1988	971,780	40	6
April 1987	869,316	35	5
May 1988	951,494	40	6
May 1987	847,549	35	6
June 1988	971,186	44(p)	7(p)
June 1987	885,171	40	7
Canadian mills			
June 1988	310,592	——	——
June 1987	272,935	——	——
U.S. mills			
June 1988	59,369	——	——
June 1987	39,845	——	——

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
June 1988	590,434	103,013	157,469	850,916
June 1987	620,070	93,079	143,616	856,765
Six months 1988	3,519,347	608,531	746,080	4,873,958
Six months 1987	3,498,732	572,614	769,931	4,841,277
Increase or decrease	+ 20,615 + 0.6%	+ 35,917 + 6.3%	-23,851 -3.1%	+ 32,681 + 0.7%
From U.S. mills				
June 1988	421,127		27,500	448,627
June 1987	426,740		24,370	451,110
Six months 1988	2,536,033		151,756	2,687,789
Six months 1987	2,444,373		157,993	2,602,366
Increase or decrease	+ 91,660 + 3.7%		-6,237 -3.9%	+ 85,423 + 3.3%
From North American mills				
June 1988	1,011,561	103,013	184,969	1,299,543
June 1987	1,046,810	93,079	167,986	1,307,875
Six months 1988	6,055,380	608,531	897,836	7,561,747
Six months 1987	5,943,105	572,614	927,924	7,443,643
Increase or decrease	+ 112,275 + 1.9%	+ 35,917 + 6.3%	-30,088 -3.2%	+ 118,104 + 1.6%

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[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons

[2] Represents stocks of newspapers in ANPA statistical sample

(r) = revised (p) = preliminary

Newspapers' TV Logs Bid for National Ads

October 1988

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The Journal of the American Newspaper Publishers Association

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Electronic Photography Coming of Age

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INDEX VOLUME 10, NUMBER 10 OCTOBER 1988

Special Report *An "electronic freeway" is being built to speed pictures from news events to newspaper pages more directly than ever before. Photographers and picture editors are making the transition from film to floppy disk, from chemicals to computers. The new technology for taking and processing digitized photographs still has a way to go, and, so far, it has been used only occasionally. But electronic photography promises such savings in time and money that many newspaper professionals look forward to making it the centerpiece of their picture-handling systems.* **30**

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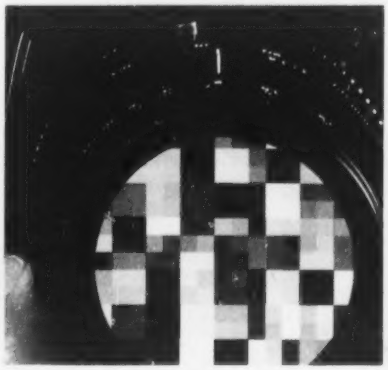

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CHAIRMAN'S CORNER

We need to apply the brakes to the newsprint roller coaster

Few things are more calculated to drive publishers to drink than trying to forecast the price and availability of newsprint. Even a careful study of the quality and quantity of *hors d'oeuvres* served by newsprint manufacturers at the annual rounds of parties during ANPA Convention Week yields no clue to the future. Papermaking, it would seem, is a boom-or-bust business—a roller-coaster ride for manufacturer and customer alike.

Arthur Ochs Sulzberger

The moment that one mentions words such as "supply" or "price" the noses of many lawyers start to twitch. As I have no particular desire to conclude my term as your chairman behind bars, I shall be circumspect. But look at some of the facts.

For most metropolitan newspapers, newsprint costs represent as much as 23 percent of operating expenses. For smaller newspapers, it is a smaller percentage, but, on the other hand, smaller newspapers generally do not have the purchasing clout to cut special discount deals. Nor do many smaller newspapers have the necessary tonnage requirements that would permit them to enter into manufacturing arrangements with traditional papermakers as The New York Times Co. and Knight-Ridder Inc. have done.

But all of us, large and small, are caught in a clutch of a terribly cyclical business. As I noted before, it's a roller-coaster ride, moving from shortages that send publishers bidding for remote production of inferior newsprint at one moment, to great globs of newsprint overhanging the market just a few short years later.

And the price of the commodity, which is what it is, tracks behind in a most consistent way. Then, what happens? One moment, with tons of paper around, we negotiate tough deals with the manufacturers. The next moment there are shortages, and the manufacturers hand it back to us. Up and down, up and down—and no one can plan for the future.

ANPA has an excellent Newsprint Committee, formed in 1976, to monitor newsprint developments and to establish priorities and programs with respect to supply, transportation, quality and research. Perhaps now is the time to ask committee members to broaden their mandate to see if they can find an effective way to curb the extreme cyclicality that plagues the manufacturing and purchase of our primary raw material. It is a tough challenge, but progress on it could bring stability to our industry.

Arthur Ochs Sulzberger

Arthur Ochs Sulzberger
ANPA Chairman

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Consumption continues downward trend

Newsprint consumption by U.S. daily newspapers decreased 4.7 percent in August compared with August 1987. It was the fifth straight month of declining consumption. (Revised figures showed that June was a down month, not a month of increased consumption as reported preliminarily [presstime, Sept. 1988, p. 71].)

However for the first eight months of the year, there was a 0.3-percent increase in U.S. dailies' consumption.

Consumption by all U.S. users also dropped in August, by 4.5 percent from August 1987. For the eight-month period, though, there was a slight increase of 0.9 percent.

Newsprint inventories of newspapers in ANPA's statistical sample averaged a 47-day supply in August, up from 43 days a year earlier.

Estimated consumption of all U.S. daily newspapers[1]

Region	**June 1988(r)**	**June 1987**	**% Change**
Northeast	194,418	197,347	-1.5
North Central	162,380	158,474	+ 2.5
South	223,069	224,446	-0.6
West	171,495	172,377	-0.5
Circulation Size			
up to 25,000	57,977	58,939	-1.6
25,001-100,000	160,932	161,306	-0.2
Over 100,000	532,453	532,399	+ 0.1
June totals	751,362	752,644	-0.2
Region	**July 1988**	**July 1987**	**% Change**
Northeast	179,242	180,902	-0.9
North Central	152,868	155,896	-1.9
South	226,452	222,644	+ 1.7
West	166,699	166,571	+ 0.1
Circulation Size			
up to 25,000	55,461	59,167	-6.3
25,001-100,000	159,576	157,144	+ 1.5
Over 100,000	510,224	509,704	+ 0.1
July totals	725,261	726,013	-0.1
Region	**August 1988(p)**	**August 1987**	**% Change**
Northeast	181,088	196,589	-7.9
North Central	157,819	164,020	-3.8
South	230,751	237,176	-2.7
West	165,820	173,634	-4.5
Circulation Size			
up to 25,000	55,991	60,290	-7.1
25,001-100,000	162,029	162,384	-0.2
Over 100,000	517,458	548,745	-5.7
August totals	735,478	771,419	-4.7
Eight-month totals	6,061,823	6,044,760	+ 0.3

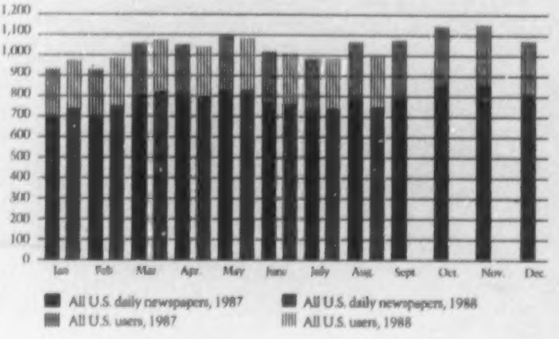
Estimated consumption of all U.S. users

	1988	**1987**	**% Change**
June totals	997,085(r)	996,326	+ 0.08(r)
July totals	973,632	967,075	+ 0.7
August totals	994,347(p)	1,040,896	-4.5(p)
Eight-month totals	8,027,718(p)	7,959,194	+ 0.9(p)

Production

	Canada	**U.S.A.**	**North America**
July 1988	826,805	435,891	1,262,696
July 1987	791,424	454,979	1,246,403
Increase	+ 35,381	-19,088	+ 16,293
or decrease	+ 4.5%	-4.2%	+ 1.3%
August 1988	845,882	461,402	1,307,284
August 1987	825,657	452,045	1,277,702
Increase	+ 20,225	+ 9,357	+ 29,582
	+ 2.4%	+ 2.1%	+ 2.3%
Eight months 1988	6,668,142	3,608,320	10,276,462
Eight months 1987	6,454,089	3,500,161	9,954,250
Increase	+ 214,053	+ 108,159	+ 322,212
	+ 3.3%	+ 3.1%	+ 3.2%

Estimated newsprint consumption, 1987-1988 (thousands of metric tons)



Stocks

U.S. publishers[2]	**Tonnage**	**Days' supply On hand**	**Days' supply In transit**
June 1988	989,453	45(r)	7
June 1987	885,171	40	7
July 1988	972,566	45	6
July 1987	931,330	39	6
August 1988	987,074	42(p)	5(p)
August 1987	904,565	37	6
Canadian mills			
July 1988	343,181		
July 1987	285,590		
August 1988	341,707		
August 1987	326,114		
U.S. mills			
July 1988	64,543		
July 1987	42,930		
August 1988	67,138		
August 1987	45,591		

Shipments

From Canadian mills	**U.S.A.**	**Canada**	**Export**	**Total**
July 1988	573,690	99,182	121,344	794,216
July 1987	575,852	87,537	115,380	778,769
August 1988	602,952	98,174	146,230	847,356
August 1987	567,536	94,938	122,659	785,133
Eight months 1988	4,695,989	805,887	1,013,654	6,515,530
Eight months 1987	4,642,120	755,089	1,007,970	6,405,179
Increase	+ 53,869	+ 50,798	+ 5,684	+ 110,351
	+ 1.2%	+ 6.7%	+ 0.6%	+ 1.7%
From U.S. mills				
July 1988	390,443		40,274	430,717
July 1987	427,573		24,321	451,894
August 1988	423,615		35,192	458,807
August 1987	428,782		20,602	449,384
Eight months 1988	3,350,091		227,222	3,577,313
Eight months 1987	3,300,728		202,916	3,503,644
Increase	+ 49,363		+ 24,306	+ 73,669
	+ 1.5%		+ 12.0%	+ 2.1%
From North American mills				
Eight months 1987	8,046,080	805,887	1,240,876	10,092,843
Eight months 1986	7,942,848	755,089	1,210,886	9,908,823
Increase	+ 103,232	+ 50,798	+ 29,990	+ 184,020
	+ 1.3%	+ 6.7%	+ 2.5%	+ 1.9%

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[1] Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2] Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

Members again say circulation/readership should be top ANPA priority

Circulation/readership issues once again have topped the list of priorities that ANPA members think the Association should adopt. The finding, part of a new membership survey completed in September, parallels concerns expressed in the last membership poll conducted a decade ago.

ANPA Chairman Arthur Ochs Sulzberger said the Association responded immediately to the 1988 results. "Both in this year's operations and in our planning for 1989, we are placing increased emphasis and resources on priority areas identified in the survey—circulation, literacy, editorial excellence and government relations," said Sulzberger, chairman of The New York Times Co. and publisher of The New York Times.

The survey also showed members generally are pleased with the Association and its activities, and believe it is becoming even more effective.

Respondents expressed little negative criticism; only 2 percent said ANPA has become "less effective" in its service to the newspaper business. Of those, the largest portion, 14 percent, said the Association should take more of an interest in small newspapers.

Respondents split on the question of whether ANPA should serve mainly as a "clearinghouse" to collect and disseminate industry information, or take a "leadership" role to "enhance the work of all newspaper organizations and newspapers."

There was clear consensus, however, that the thrust of ANPA's work should be directed at long-term objectives, even if that means devoting less attention to short-term concerns.

The new survey was conducted by the Gallup Organization of Princeton, N.J., which mailed questionnaires to 5,220 personnel of ANPA-member newspapers. The response rate was 44 percent.

ANPA Secretary Lloyd G. Schermer, chairman of the Membership Survey Task Force, said this year's poll was more comprehensive and drew wider member participation than the one in 1978. "Perhaps most important," said Schermer, chairman and chief executive officer of Lee Enterprises Inc., "was the breakout of the views of executives from all the key departments of our newspapers, each of whom needs and uses ANPA for different things."

ANPA President Jerry W. Friedheim said that while the Association is responding immediately to the priority concerns identified by respondents, it is "not curtailing any other vital services, such as production, human resources, **presstime**, meetings or training."

He pointed out that after ANPA members in the 1978 survey expressed the desire for better communications, the Association started **presstime**. "We will respond similarly this time to what's most important to the business."

Participants were classified five ways: "top management executives," including publishers, chief executive officers and general managers; editors; advertising and circulation executives; human resources executives; and production executives.

Because of the way the survey was structured, the precise number of newspapers whose executives responded could not be tabulated. However, Gallup says it is "reasonable to conclude that well over half of the member newspapers are represented."

In this year's study, the majority of executives—especially in "top management"—said ANPA has been "more effective" in its work over the last five years. The biggest reasons given were ANPA's "broadened scope"; publication of **presstime**, considered the "major point of contact with ANPA across all management types"; the belief that the Association "keeps up with current situations"; and the belief that it has "better communication" with the membership.

The survey also showed that most respondents believe ANPA represents their legislative and public-policy interests effectively.

Among responses to tailored questionnaires prepared for different executive classifications were these:

- **Top management.** "Circulation/readership" was the group's top priority, followed by "reading skills/literacy," competition from other print media for advertising and circulation, editorial quality, and operating costs. Minority opportunity, an area of recent newspaper-industry emphasis, was 14th among 18 rankings. Last was "international press freedom."

Of 26 ANPA services listed in the questionnaire, only one—**presstime**—was reported to be used by a majority of respondents, 73 percent. Information on and assistance in the Newspaper in Education program was the second most widely used service at 46 percent.

Forty-three percent of top managers said they had attended an ANPA Convention, and 34 percent said they had attended ANPA/TEC.

- **Editors.** "Editorial quality" was cited as the second most important issue behind "circulation/readership." "Minority opportunity" was the eighth-most-important issue among 14 rankings. The editors put environmental issues at the bottom of their priority list.

- **Advertising/circulation.** Like top management and editors, this group cited "circulation/readership" as the top concern. "Reading skills/literacy" was the second-

How top executives rate issues affecting the newspaper business

(as a percentage of 729 respondents)

	Most important today	Should be priorities now	Will need ANPA help in future
Circulation/readership	90	67	40
Reading skills/literacy	55	27	26
Competition from other print media for advertising and circulation	48	28	24
Editorial quality	47	18	15
Operating costs	42	14	17
Distribution and delivery	40	17	17
Newsprint	40	18	16
New production methods and technology	37	22	28
Competition from television/cable for advertising and audience	35	18	20
Impact of government on newspapers	34	30	28
Postal rates and services	34	22	20
Personnel recruitment and training	31	13	14
Production quality improvement	27	12	17
Free press issues	24	14	14
New media/electronic directories/electronic classifieds	23	10	20
Minority opportunity	18	9	8
Employee health/drugs/AIDS issues	13	7	14
Environmental issues	11	8	14
Labor unions	10	4	5
International press freedom	6	2	4

most-important, followed by competition from other print media for advertising and circulation. Minority opportunity and "employee health/drugs/AIDS issues and incentives" tied for last.

• **Human resources.** The majority of this group said the most important topic for the newspaper business is "employee compensation/bonus and incentives," followed by "employee health/drugs/AIDS issues." Minority hiring was rated sixth among nine topic rankings, and labor unions ranked eighth. (Human resources executives were not asked to comment on circulation/readership, marketing or editorial issues.)

• **Production.** Most respondents said "new production methods and technology" constitute the top priority, followed equally by newsprint quality and price, and production quality improvement. Minority opportunity was 11th of 12 rankings, and "labor unions" was last. (Like the human resources group, production executives were not asked to comment on circulation/readership, marketing or editorial issues.)

For other information about the survey, contact the ANPA Public Affairs Department at The Newspaper Center, Reston, Va. ☐

Terrell joins presstime as assistant m.e.

Pamela M. Terrell has joined **presstime** as assistant managing editor.

Terrell had worked since 1981 for United Press International, initially as a reporter in Memphis and most recently as desk editor in UPI's Washington, D.C., headquarters.

Pamela M. Terrell

Prior to that, she was a reporter for the Arkansas Democrat of Little Rock, including a stint as Washington correspondent. She also was a Munich-based free-lance editor and translator, an English teacher, and a congressional aide.

She holds a bachelor's degree in English literature from the University of California, Berkeley, and has done graduate work.

Terrell, her husband and their daughter live in Reston, Va. ☐

Manasco to oversee press, plate operations

Gene Manasco, formerly an ANPA production engineer, has been promoted to manager/press and plate systems in ANPA's Technical Research Department.

Gene Manasco

Manasco has been with ANPA since 1974, when he was hired to gather offset printing data from newspapers for use in ANPA research. In his new role, he will be responsible for the operation of all press and plate systems used in Association research and also will supervise The Newspaper Center machine shop.

Manasco also oversees ANPA's quality programs, including a service that evaluates printing reproduction for newspapers. The promotion is effective immediately, ANPA President Jerry W. Friedheim announced. ☐

Do You Understand Your Waste Management Responsibilities?

8th Annual
ANPA Health and Safety Symposium
Boston Marriott Long Wharf
November 3-4, 1988

Newspaper waste management is an increasingly complex and difficult responsibility. The 1988 ANPA Health and Safety Symposium will address waste management and other issues of importance to newspaper managers. This year's topics will include:

- Ink and Solvent Recycling
- Newsprint Recycling
- Waste Management Programs
- Superfund
- Community Right-to-Know
- Drug Testing Update
- Safety and Security Programs
- California Proposition 65
- OSHA and NIOSH Developments
- Newspaper Nursing

The 1988 Symposium brings you relevant presentations from experts in the newspaper industry and in the industrial and environmental health fields. The $375 registration fee covers admission to all symposium sessions, continental breakfast on both meeting days, a reception Wednesday evening and a luncheon on Thursday.

Call ANPA Environmental Services at (703) 648-1219 for more symposium information and a registration form.